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ABSTRACT

Focusing on the present state of book development in Latin America, this report examines measures that might improve local book industries and meet the need for endogenous literature. The various sections of the report discuss (1) the demographic, economic, and educational factors governing the book market in the region and ways to evaluate its potential; (2) the intellectual aspects of book production, including equipment and facilities, training, and materials; (3) publishing considerations; (4) the physical aspects of production, including equipment and facilities, training, and materials; (5) aspects of distribution, such as marketing, developing new markets, and libraries; (6) aspects of circulation; (7) and book promotion considerations. The final section summarizes the report and offers suggestions for a regional book policy. (FL)

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Studies on books and reading No. 2

THE LATIN AMERICAN BOOK MARKET: PROBLEMS AND PROSPECTS

by Alberto E. Augsburger

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ALBERTO E. AUGSBURGER

THE LATIN AMERICAN BOOK MARKET: PROBLEMS AND PROSPECTS

UNESCO
1981

FOREWORD

This document is one of a series prepared as background material for the World Congress on Books to be held in London, United Kingdom, from 7 to 11 June 1982. It is an attempt to evaluate the present state of book development in Latin America and also looks towards the future, indicating measures that might help to improve local book industries and thus meet the need for endogenous literature in the area.

The author, Alberto Augsberger, was formerly a Unesco expert attached to the Regional Centre for Book Development in Latin America and the Caribbean (CERLAL) in Bogotá, Colombia.

The author is responsible for the choice and the presentation of the facts contained in this document, and for the opinions expressed therein, which are not necessarily those of Unesco and do not commit the Organization.

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INTRODUCTION

This study is divided into eight chapters covering different, yet interrelated, aspects of the subject. Chapter I outlines the main factors governing the book market in the region and provides a basis for evaluating its potential. Chapters II to VII give a detailed account of the different stages of book publishing and the processes involved in it. Chapter VIII contains a number of conclusions on the subject.

This is not an exhaustive study of all the changing patterns of the Latin American book market or of the prospects and approaches to be observed in each phase and facet of book production. Any omissions and inadequacies are due to the fact that the magnitude of the subject has made it necessary to deal briefly with each of the various themes. The work should be supplemented by other studies of a more detailed nature and by the results of recent investigation in this field.

This study draws extensively on a number of documents produced or published by the Regional Centre for Book Development in Latin America and the Caribbean (CERLAL), particularly the report on publishing and bases for a survey of questions related to book production and circulation in the region, which was prepared for the Intergovernmental Conference on Communication Policies in Latin America and the Caribbean held in San José (Costa Rica) in July 1976.

We hope that the subjects considered will serve as a point of departure for the future publication of a more detailed work incorporating analysis and research. Our aim in publishing this study is to provide a general survey of book production in Latin America and so contribute to the formulation, at the level of both legal norms and practice, of policies which will promote the development sought by the different nations and which reflect regional requirements.

Certain facts, which are becoming increasingly important, must be borne in mind when we consider the Latin American book market. For one thing, Spanish is spoken by almost three hundred million people in the five continents. It ranks alongside English as a world language and it is daily increasing in stature. In fact, in some European countries (such as the Federal Republic of Germany) and in many schools and colleges in the United States, Spanish is now a compulsory subject. It has ousted French as the most important foreign language in the United States. In the latter country, where the Spanish-speaking population numbers some 20 million people, Spanish has become the second language, and the number of pupils studying it has increased considerably. In overall terms, there are more than three students of Spanish for every two of French in the U.S.A.

It should also be recalled that nearly three million people speak Spanish in the Philippines. Assuming that the population will increase annually by three per cent on an average in the Spanish-speaking countries, the total number of Spanish-speaking persons will reach the 400 million mark by the year 2000. These figures give some idea of the growing influence of Spanish in the world and indicate that there is a very large market for books in that language.

TABLE 1

BASIC DATA ON LATIN AMERICA

Country	Estimates of mid year population 1973 (1000)	Area (km2)	Inhabitants per km2 1973	Rural population		GNP per capita in $ 1972	Electric energy Kwh per inhabitant 1972*	Railway lines		Improved roads		Telephones per 1000 inhabitants 1973	Percentage of illiteracy in the population aged 15 years and over			
				Year	% of rural population			Year	per 1000 km2	Year	per 1000 km2		Year	Total	Male	Female
Argentina	24 286	2 776 899	9	1970	28.0	1 290	854	1972	15.00	1972	79.31	8.4	1970	7.4	6.5	8.3
Bahamas[1]	193	11 405	17	1970	42.1	2 240	3 321					28.5	1963	10.3	9.9	10.6
Barbados	243	430	57	1970	96.3	800	813			1966	2 881.40	15.6	1946	8.9	7.7	10.7
Bolivia	5 331	1 098 581	5			200	105[3]	1972	3.49	1972	25.71	0.9	1960	61.2	52.0	70.0
Brazil	101 700	8 511 965	12	1973	41.7	530	529	1971	3.71	1971	143.06	2.3	1970	33.6	30.6	36.[illegible]
Chile	10 229	756 945	14	1970	24.0	800	612	1971	10.90	1972	81.71	4.7	1970	11.9	11.1	12.8
Colombia	23 209	1 138 914	20	1973	36.6	400	398	1972	3.02	1972	41.18	4.6	1973	19.2	18.0	20.2
Costa Rica	1 887	50 700	37			630	655	1972	20.63	1972	434.16	4.6	1973	11.6	11.4	11.8
Cuba	8 873	114 524	77	1971	39.5	450	481	1967	44.35			3.2				
Dominican Republic	4 432	48 734	91	1970	60.2	480	279	1972	11.56	1972	220.79	1.9	1970	32.8	31.2	34.3
Ecuador	6 726	283 561	24	1972	60.8	360	150	1972	4.32	1972	75.12	1.9	1962	32.5	27.9	36.9
El Salvador	3 864	21 393	181	1971	60.6	340	207	1972	33.25	1972	506.57	1.2	1971	43.1	...	...
Grenada	95	344	276			420	191[5]					3.9	1946	23.6	22.8	24.1
Guatemala	5 540	108 889	51	1973	66.2	420	130[4]	1972	7.13	1972	123.51	1.0	1973	53.9	46.1	61.5
Guyana	757	214 969	4	1973	60.0	400	232	1972	0.48	1972	13.53	2.3	1946	24.1	18.5	29.5
Haiti	5 200	27 750	187	1971	80.6	130	22[7]	1965	9.15	1970	113.51	0.2	1960	85.5	83.0	88.0
Honduras	2 781	112 088	25	1973	71.7	320	124	1972	9.08	1972	77.74	0.5	1961	55.0	51.3	58.5
Jamaica	1 976	10 962	180	1970	62.9	810	575	1972	31.50	1971	1 042.33	4.3	1960	18.1	21.4	15.2
Mexico	54 303	1 972 546	28	1973	38.8	750	581	1972	10.10	1972	41.97	4.2	1970	25.8	21.8	29.6
Netherlands Antilles[1]	234	961	24			1 500	2 386[3]					13.7	1971	7.5	7.4	7.6
Nicaragua	2 015	130 000	16	1972	51.4	470	260[4]	1972	3.19	1972	105.12	0.8	1971	42.5	42.0	42.9
Panama	1 570	75 650	21	1973	51.0	880	622[5]	1972	8.95	1972	92.74	6.6	1970	21.7	21.0	22.2
Paraguay	2 674	406 752	7	1970	64.3	320	70[5]	1972	1.17	1968	39.23	1.0	1972	19.9	14.9	24.5
Peru	14 912	1 285 216	12	1973	45.4	520	235[5]	1972	1.97	1972	39.16	2.2	1972	27.7	...	
Surinam[1]	432	163 265	3			810	258					3.4	1964	16.4	16.0	16.7
Trinidad and Tobago	1 064	5 128	207	1970	87.6	970	1 031	1968	2.54	1968	1 310.45	6.3	1961	6.6	8.0	6.0
Uruguay	2 992	177 508	17		14.0	760	784[5]	1972	16.75	1970	291.51	8.3	1963	9.6	9.8	9.3
Venezuela	11 293	912 050	12	1970	24.3	1 240	713[2]	1964	0.32	1972	48.55	4.6	1971	23.5	20.3	26.6
British Eastern Caribbean Group[2]	422	2 652														
Antigua	71	442	167			430						4.1	1960	11.3	10.3	12.0
Dominica	73	751	97			320	93[1]					3.7	1946	40.6	42.1	36.5
Montserrat	12	98	122				592					12.8	1960	19.5	20.3	18.9
St Kitts	65	357	182			410	198[5]					2.5	1960	11.8	11.2	12.2
St Lucia	107	616	174			420	289					5.3	1946	48.3	46.7	45.0
St Vincent	91	388	235			270	167[5]					4.6	1946	23.8	23.6	23.8
Region	299 233	20 420 781	15													

Notes

1) 1966 2) 1968 3) 1969 4) 1970 5) 1971 6) 1972
7) total gross generation of electricity
... Data not available
1 Non-Member States
2 Associate Member State

Source

Population . . . Unesco Statistical Yearbook 1974
Area . . . . . Unesco Statistical Yearbook 1974
Inhabitant per km2 Unesco Statistical Yearbook 1974
Rural population . UN Demographic Yearbook 1973
GNP . . . . . . World Bank Atlas, 1974
Electric energy . . . UN Statistical Yearbook 1973. Gross production by enterprises generating primarily for public use

Gross enrolment ratios						Radio Broadcasting			Television Broadcasting			Cinemas			Daily Newspapers		Newsprint consumpt per inhab- itant	Country
Primary education		Secondary education		Higher education age 20-24		Transmitters		Receivers per 1000 inhab- itants 1973*	Transmitters		Receivers per 1000 inhab- itants 1973*		Seating capacity per 1000 inhab- itants	Annual attend ance per inhab- itant		Circula- tion per 1000 in- habitants		
Year	Ratio	Year	Ratio	Year	Ratio	Year	Number		Year	Number		Year			Number 1973*		1974	
1972	104	1972	47	1972	16.95	1973	163	425[5]	1973	76	163	1973	32,0	2,6	162	154[6]	7.3	Argentina
						1971	6	440				1971	22,0	. . .	2	155	5.1	Bahamas[1]
1971	101	1971	51	1971	5,01	1972	3	477	1973	2	144	1973	19,3	7,4	1	99	2,1	Barbados
1972	73	1972	31	1965	4,58	1968	92	. . .							17	38	0,9	Bolivia
1971	71	1971	74	1971	6,73	1972	1 004	62	1973	67	67[6]	1967	22,0	3,0	274	40	2,6	Brazil
1973	111	1973	48	1972	10,90	1971	229	147	1973	25	51	1971	27,3	5,0	122	89	6,9	Chile
1972	114	1972	28	1970	4,81	1971	244	120	1966	15	53[6]	1968	22,0	5,0	36	109[5]	1,8	Colombia
1972	107	1972	33	1972	12,11			74	1968	8	65				8	112	5,0	Costa Rica
1972	152	1972	24	1972	5,37			202			59	1972	33,6	14,2	16	95[6]	2,7	Cuba
1972	108	1971	20	1972	8,62	1971	146	41	1972	7	35	1971	9,7	1,2	7	38[6]	. .	Dominican Republic
1972	96	1972	25	1971	8,24	1972	232	270[5]	1972	14	27[6]	1972	17,6	2.5	22	46	3,8	Ecuador
1972	71	1972	16	1971	4,35	1971	65	95[5]	1971	3	29	1971	15,0	3,0	13	103[4]	3,6	El Salvador
								182							2	31[5]	0,6	Grenada
1972	61	1972	10	1972	4,09	1971	94	47	1972	7	19	1972	13,9	1,5	8	39[6]	1,3	Guatemala
1972	93	1971	57	1972	1,97	1971	8	198				1974	49,5	12,1	3	88	2,2	Guyana
1971	41	1965	4	1965	0,40	1965	26	17	1968	1	25				7	16	0,1	Haiti
1972	35	1970	10	1970	2,03	1968	126	56	1968	5	9[5]				12	42	0,7	Honduras
1972	106	1972	32	1972	4,79	1974	21	320	1974	13	51	1974	22,8	. . .	3	91	4,1	Jamaica
1971	107	1971	24	1971	6,32	1972	644	311	1973	69	80	1973	28,6	4,1	227	. .	2,6	Mexico
						1966	11	556	1968	3	145	1966	33,0	. . .	5	188	2,6	Netherlands Antilles[1]
1972	83	1972	20	1972	6,93			62	1968	2	31				6	27[6]	1,9	Nicaragua
1972	116	1972	48	1970	6,53	1971	117	162	1971	10	131[6]	1971	26,9	4,8	9	92	3,5	Panama
1971	107	1971	17	1970	3,80			66	1968	1	20				11	38[6]	1,7	Paraguay
1972	132	1972	46	1972	11,12	1973	302	134	1973	36	28				70	. .	2,9	Peru
1960	108	1960	25	1965	3,71	1966	4	250	1968	3	72	1965		5,0	6	57[6]	1,2	Surinam[1]
1970	110	1970	40	1970	2,56	1971	9	287[5]	1973	3	87	1972	40,9		3	136[4]	6,9	Trinidad and Tobago
1972	108	1972	62	1965	8,40	1970	99	501	1970	17	102	1967	45,0	. .	54	267[6]	3,7	Uruguay
1972	101	1972	47	1972	12,63	1971	235	177	1971	50	88	1971		3,4	42	93[5]	6,3	Venezuela
																		British Eastern Caribbean Group[2]
						1971	2	176	1972	3	162	1966	28	2,0	1	54		Antigua
						1970	2					1970	20	. .		.		Dominica
						1969	9 3	.				1969	13	0,7		. .		Montserrat
								. . .							2	15[6]		St-Kitts
						1971	2	. .				1970	83			.		St-Lucia
																		St-Vincent
						1972	3 889	170	1972	440	67	1972	24		1 200	76	2,9	Region

ailway lines	America en cifras 1974. Organización de los Estados Americanos
mproved Roads	America en cifras 1974. Organización de los Estados Americanos
elephones	UN Statistical Yearbook 1974
literacy	Unesco Statistical Yearbooks
nrolment	Unesco Statistical Yearbook 1974

Radio Broadcasting	Unesco Statistical Yearbook 1974
Television Broadcasting	Unesco Statistical Yearbook 1974
Cinemas	Unesco Statistical Yearbook 1974
Daily newspapers	Unesco Statistical Yearbook 1974
Newsprint consump. per inhabitant	Unesco Statistical Yearbook 1974

CHAPTER I - GENERAL CONSIDERATIONS

1.1 Demographic factors

Over the last 30 years, the population question has been a cause of mounting concern in Latin America. The rapid growth of the population and its geographical redistribution call for greater understanding and consistent action in the context of general development policies.

The main population problems in Latin America have been systematically examined by both international and national agencies. This study is based on documents prepared by the information services of the United Nations Economic Commission for Latin America (ECLA) and the Latin American Demographic Centre (CELADE); but much other valuable material on the subject is available.

We make no claim to give detailed technical information on the subject. We shall merely endeavour to indicate the main points which will help the reader to understand the implications of population issues for the planning or development of any market.

The population of Latin America is expanding steadily, at a much faster rate than the population of any other region. In 1975, the total population of the region was estimated at 316 million (in round figures), as against were 158 million in 1950. This means that the population doubled in 25 years. Today it is probably about 370 million. The projected population for the year 2000 is almost 650 million. This means that the population will also practically double over the next 25 years, as shown by the projections contained in Table 2.

The population growth rate of a country is determined by three factors: fertility, mortality and international migration. It is generally accepted that in Latin America as a whole changes in growth trends will primarily be dependent on fertility patterns, since the rate of mortality has declined and it is unlikely that immigration will be as significant a factor in the future as it was in the past in the growth of the population of some Latin American countries.

If we examine population trends in the sixties we shall see that the fertility pattern in Latin America was extremely heterogeneous in terms of both the level and the magnitude of the changes which occurred. Fertility declined significantly in Brazil and Costa Rica. The Brazilian decline in fertility is important in view of its considerable repercussions on the overall population figures. Costa Rica has recently experienced a population change which many other countries could emulate in the coming decades.

One of the documents published by ECLA indicates that population growth in the region will probably remain stationary throughout the eighties, since the different trends recorded in the various groups of countries offset each other.

Accordingly, the Argentine and Uruguayan population growth rates, which were fairly slow in the sixties, will continue to drop slightly owing to the combined effect of the decline in the birth rates and the slight increase in the mortality rates - a situation which was already in evidence in the sixties, when it was seen as a consequence of the population ageing process.

Although the mortality rates in Chile, Costa Rica and Cuba are already so low that they are unlikely to drop significantly in the future, a similar, although steeper, decline in population growth is to be expected in these countries as there

TABLE 2

POPULATION PROJECTIONS, BY COUNTRIES, 1970-2000

COUNTRY	1970	1980	1990	2000
ARGENTINA	24.352	28.218	31.909	35.274
BOLIVIA	4.658	6.006	7.782	10.081
BRAZIL	93.245	124.000	164.374	215.510
COLOMBIA	22.160	31.366	43.130	56.731
COSTA RICA	1.736	2.281	2.945	3.682
CUBA	8.341	10.075	12.053	14.337
CHILE	9.717	11.461	13.734	16.272
ECUADOR	6.028	8.440	11.774	16.149
EL SALVADOR	3.441	4.904	7.122	10.372
GUATEMALA	5.282	7.018	9.357	12.355
HAITI	5.229	6.838	9.144	12.347
HONDURAS	2.583	3.661	5.182	7.205
MEXICO	50.718	71.387	99.069	135.089
NICARAGUA	2.021	2.818	3.951	5.460
PANAMA	1.406	1.938	2.669	3.633
PARAGUAY	2.419	3.456	4.860	6.619
PERU	13.586	18.527	25.143	33.491
DOMINICAN REPUBLIC	4.348	6.197	8.866	12.549
URUGUAY	2.889	3.251	3.642	3.999
VENEZUELA	10.755	14.979	19.952	26.100
Subtotal (20 countries)	274.914	366.821	487.258	637.245
BARBADOS	254	263	236	212
GUYANA	745	995	1.309	1.646
JAMAICA	1.996	2.382	2.754	3.102
TRINIDAD AND TOBAGO	1.067	1.255	1.411	1.555
Subtotal (24 countries)	4.062	4.845	5.710	6.515
TOTAL	278.976	371.666	492.968	643.760

Source: CELADE, Boletín Demográfico, Year V, No. 10, July 1972.

is a far greater margin for a decrease in the birth rates in them than Argentina and Uruguay.

In the present decade, the population growth rates of a third group of countries, which includes Brazil, Colombia, Ecuador, Peru, Mexico, Panama and Venezuela, will probably fluctuate around the levels observed in the last decade. As around 72 per cent of Latin Americans live in these seven countries, the explanation of the stabilization in population growth likely to occur in the coming decade, given above in relation to the region as a whole, is particularly true of this group of countries.

Another group of countries, consisting of Bolivia, the Dominican Republic, El Salvador, Guatemala, Haiti, Honduras, Nicaragua and Paraguay, is at an earlier stage of demographic transition, and it is therefore quite possible that population growth will accelerate in these countries over the next decade.

If these trends continue, particularly in the most populous countries, Latin America will have some 90 million more inhabitants in the eighties than in the seventies. The bulk of this increase will occur in Brazil, Mexico, Colombia and Peru, which should together account for more than 70 per cent of the total increase in the population of the region in the course of the decade.

Examining the social and economic factors which affect population trends in Latin America, ECLA has studied the rapid changes in the population of the region and has pointed out some of the difficulties and obstacles which came to light in the course of its study - for instance, the heterogeneity of the region, the effect of which is that there seem to be more than 20 Latin Americas instead of one.

The study distinguishes at least three groups of countries: those in the period of early modernization (the Southern Cone and Cuba), "newly urbanized" countries and countries in the initial period of urbanization. Allowing for the fact that this distinction reflects historical viewpoints and should be applied with certain reservations, the document notes that four countries - Argentina, Cuba, Chile and Uruguay - had reached the threshold of urbanization by the turn of the century.

In these countries, the main determining factor in early urban growth was the prosperity generated by the external sector. The export trade was dominated by products requiring at least some rudimentary industrial processing in the country of origin.

In the second group, the "newly urbanized" countries, the urbanization process began to attain some significance between 1930 and 1950. This category includes the majority of the larger or more populous countries of the region - Brazil, Mexico, Colombia, Peru and Venezuela - together with Panama and Costa Rica.

In most cases, the acceleration of urban growth in these countries received its initial impetus from the severe crisis in the world's agricultural produce market in the nineteen-thirties. As it coincided with the beginning of the most explosive stage of demographic transition, it had a considerable influence on the scale of migration and the rate of urban growth.

Fuelled by rapid population growth, large-scale urbanization is continuing in a number of these countries.

The countries in the third group - Ecuador, Bolivia, Paraguay, Nicaragua, Honduras, Haiti, El Salvador, Guatemala and the Dominican Republic - are in the initial period of urbanization. In 1950, none of these countries had an urban

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population of more than one-fifth of its total population. Many of them did not reach this stage until the end of the sixties, while other countries have still not reached it. In these countries the rate of urban growth has only begun to quicken in recent years.

The accelerated population growth recorded in Latin America has not been accompanied by a similar expansion of the labour market. This is due to the fact that economic growth in the region does not produce a proportionately larger number of jobs, since it is based on the introduction of technology that does not need a high labour input, particularly in the industrial sector.

In addition to these remarks about the demographic situation in the region, something should be said about the structure of the population by age-groups. Around 50 per cent of the Latin American population is under 20 - a fact worth noting, for it indicates the magnitude of the needs of these societies. The percentage of children under 15 is of the order of 42.47, whereas only 3.70 per cent of the population are over 65. The proportion of persons in the 15-65 age-group varies within very narrow margins. The minimum figure was 53.47 per cent in 1965-1970. The maximum proportion will be 57.22 per cent in 1995-2000. Lastly, the percentage of persons over 65 - which is very low, as already mentioned - has shown a slight but significant increase over the years: it was 3.45 per cent in 1950-1955, and it is expected to be 4.36 per cent in 1995-2000 (Tables 3 and 4).

From the age structure of the population we can work out a simple dependence rate - the number of children (under 15) and old people (over 65) for each economically active member of the population (persons between the ages of 15 and 65). This dependence rate is 85.78 per cent, having risen from 80.70 per cent in 1950-1955 to a maximum of 87.02 in 1965-1970. Since then, the presumed drop in fertility has led to a persistent decline in the dependence rate over the years. It should fall to its lowest level (74.80 per cent) towards the end of the century.

Growth rates such as the present rate - of the order of 28 per 1,000 - are very high. As we have seen, they mean that the population has doubled in a mere 25 years. Even the annual rate of 24 per thousand predicted for the end of the century is very high and means that the population will double in less than 30 years. According to the projections, vigorous population growth will continue well into the next century, despite the decline in fertility. As in the case of overall population growth, the situation differs in the various countries of the region. In countries with low fertility rates, there is a smaller proportion of children and young people and, consequently, less demand for education, while countries with high fertility rates - the majority - are faced with a continuous and increasing need to expand their educational resources.

2.1 Economic and social development

Although development has been particularly dynamic in the countries of Latin America over the last three decades, it has been extremely uneven in most of the countries.(1)

The most important features of the economic trends in 1977 were a relatively slow growth of production compared with the expansion up to 1974, a significant

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(1) This section is broadly based on the information and data contained in the Inter-American Development Bank publication entitled "Economic and Social Progress in Latin America", 1977 report, Washington, D.C.

Table 3
Total population and growth rates, by countries, 1960, 1973-1977

Country	1960	1973	1974	1975	1976	1977	Average annual growth rates 1970-77 (percentages)
	(thousands of persons)						
Argentina	19,937	24,286	24,648	25,036	25,384	26,056	1.7
Barbados	0.233	0,240	0,240	0.242	0.243	0,243	0.2
Bolivia	3,313	4,344	4.435	4,528	4.624	4,788	2.3
Brazil	70,758	101,433	104,243	107,145	110.123	113.208	2.8
Chile	7,701	9,894	10,072	10,253	10,428	10,656	1.9
Colombia	15,397	22,296	22.913	23,416	24.105	24,762	2.7
Costa Rica	1,254	1,877	1,934	1,968	2,020	2,090	2.9
Dominican Republic	3,036	4,425	4,562	4,725	4,846	4,978	3.0
Ecuador	4,336	6,315	6,501	6,690	6,873	7,088	2.9
El Salvador	2,433	3,808	3.942	4,108	4,224	4,255	3.1
Guatemala	3.943	5,540	5,694	5.852	6,018	6.168	2.8
Guyana	0,562	0,754	0,771	0,789	0.806	0,825	2.1
Haiti	3,574	4,440	4,516	4,584	4,668	4,749	1.7
Honduras	1,843	2,605	2,675	2,747	2,821	2,897	2.7
Jamaica	1,613	1,955	1,984	2,014	2,045	2,075	1.5
Mexico	34,923	56,168	58,122	60,145	62,238	64,404	3.5
Nicaragua	1,420	2,028	2,085	2,162	2,218	2,325	3.2
Panama	1,062	1,570	1,618	1,668	1,719	1,771	3.1
Paraguay	1,710	2,412	2,476	2,647	2,739	2,813	3.4
Peru	10,022	14,628	15,044	15,470	15,908	16,358	2.9
Trinidad and Tobago	0,831	1,062	1,076	1,096	1,110	1,137	1.5
Uruguay	2,483	2,725	2,744	2,764	2,782	2,846	0.9
Venezuela	7,352	11,282	11,632	11,993	12,361	12,737	3.1
Latin America	**199,736**	**286,087**	**293,927**	**302,042**	**310,303**	**319,229**	**2.8**

Table 4
Urban and rural population, by countries, 1960 and 1977
(thousands of persons)

Country	1960			1977			Growth rates of urban pop. 1960-77 (percentages)
	Urban	Rural	% Urban	Urban	Rural	% Urban	
Argentina	14,676	5,261	73.6	21,814	4,242	83.7	2.3
Barbados	94	139	40.3	111	132	45.7	1.0
Bolivia	887	2,426	26.8	1,508	3.280	31.5	3.1
Brazil	32,598	38,160	46.1	72,310	40.898	63.9	4.8
Chile	5,222	2,479	67.8	8,444	2,212	79.2	2.9
Colombia	7,420	7,977	48.2	17,284	7,478	69.8	5.1
Costa Rica	410	844	32.7	913	1,177	43.7	4.9
Dominican Republic	914	2,122	30.1	2,444	2,534	49.1	6.0
Ecuador	1,515	2,821	34.9	3,048	4,040	43.0	4.6
El Salvador	935	1,498	38.4	1,702	2,553	40.0	3.8
Guatemala	1,325	2,618	33.6	1,918	4,250	31.1	2.2
Guyana	159	403	28.3	350	475	42.4	4.8
Haiti	568	3,006	15.9	1,092	3,657	23.0	3.9
Honduras	420	1,423	22.8	988	1,909	34.1	4.6
Jamaica	381	1,232	23.7	1,223	852	58.9	7.1
Mexico	17,705	17,218	50.7	40,446	23,958	62.8	5.0
Nicaragua	545	875	38.4	1,263	1,062	54.3	5.1
Panama	441	621	41.5	917	854	51.8	4.4
Paraguay	605	1,105	35.4	1,018	1,795	36.2	3.1
Peru	4,630	5,392	46.2	10,829	5,529	66.2	5.2
Trinidad and Tobago	325	506	39.2	676	461	59.5	4.4
Uruguay[a]	2,006	477	80.8	2,299	547	[illegible]	0.8
Venezuela	4,901	2,451	66.7	[illegible]	3,071	75.9	4.1
Latin America	**98,682**	**101,054**	**49.4**	**202,253**	[illegible]	**63.4**	**4.3**

[a] Based on the results of the 1963 census.

reduction of the external deficit and the persistence of inflationary trends which, although less acute in the extreme cases, generally worsened and became more persuasive. These results are not satisfactory, particularly when considered in relation to the region's economic performance in past years; to a great extent they reflect the delayed effects of the 1974-1975 economic recession of the industrial countries, from which they are slowly recovering, and the difficulties facing the region in adjusting to the higher costs of oil and of energy in general.

The combined gross domestic product of the Latin American countries grew by an estimated average of 4.5 per cent in 1977. This increase is slightly lower than the 4.8 per cent recorded in 1976. According to a recent ECLA study, a rise of 4.1 per cent was expected to occur in 1978.

Viewed in a global and long-term context, Latin America as a whole, during the sixties and the first eight years of the seventies, registered a major economic expansion and diversification that bettered the general living conditions of the population and strengthened the region's position in the world economy. The combined gross national product of the Latin American countries, stated in constant 1976 dollars, increased from $129 billion in 1960 to approximately $334 billion in 1977, at a cumulative growth rate equal to 5.8 per cent a year. From 1968 to 1974 the product grew at an exceptionally high rate of 7.3 per cent a year. As a proportion of the combined product of the industrial countries, Latin America's GNP increased from 6 per cent in 1960 to 7.6 in 1976. The Latin American product represented just over 26 per cent of the combined product of developing countries, exclusive of OPEC members.

It is estimated that around 63 per cent of the population now lives in cities, compared with 49 per cent in 1960. If we subtract population growth from overall economic growth, we see that the average per capita product of Latin America rose from $645 in 1960 to about $1,040 in 1977. In the course of the period, the pace of real increase of the per capita product accelerated from an average rate of 2.4 per cent in 1961-1965 to 3.1 per cent in 1966-1970 and to 4.5 per cent in 1971-1974. In the years 1975-1977 the per capita product increased by an average of only 1.2 per cent annually because of the decline in overall economic growth.

Despite the considerable expansion in Latin American economic activity, the region's per capita product has held at nearly 17 per cent that of the industrial countries, which has resulted in a widening of the absolute gap between the average living standards of the two groups of countries. If the economic and demographic trends of recent years hold, Latin America will double its per capita product in about 25 years. To narrow the economic gap with the industrial countries, however, the region will have to make an even greater economic effort than it has so far and attain a significant drop in the growth of its population. It will not be easy to bring about such a drop if economic growth is not accompanied by an improvement in the educational and cultural circumstances of the inhabitants of the region.

In 1976 and 1977, most of the Latin American countries experienced a considerable economic recovery from the downturn in 1975. The rate of growth of the gross domestic product moved from 3.1 per cent in 1975 to 4.8 per cent in 1976 and 4.5 per cent in 1977, compared with an average annual rate of 6.2 per cent in 1968-1974 (Table 5).

The economic performances of individual Latin American countries in recent years differed significantly. Brazil, Ecuador and the Dominican Republic recorded outstanding gains. Brazil's gross domestic product more than doubled between 1961 and 1965 (5.5 per cent a year) and between 1971 and 1974 (12.2 per cent a year), with wide swings in the last three years. Ecuador showed a similar trend,

Table 5

Latin America. Gross Domestic Product, total and per capita, by countries, 1960, 1973-1977

Country	Total (millions of 1976 dollars)						Per capita (1976 dollars)				Annual variations (percentages)						
	1960	1973	1974	1975	1976	1977[b]	1960	1970	1976	1977[b]	1961-65	1966-70	1971-75	1974	1975	1976	1977[b]
Argentina	24.055,2	42.120,7	44.846,5	44.257,0	42.967,5	44.840,5	1.206,6	1.582,5	1.692,7	1.720,9	4,5	4,3	3,8	6,5	-1,3	-2,9	4,4
Barbados	206,1	375,8	365,1	369,8	383,9	402,0	804,6	1.337,6	1.580,0	1.654,3	2,4	7,5	2,3	-2,8	1,3	3,8	4,7
Bolivia	906,0	1.843,6	1.963,1	2.076,6	2.210,1	2.320,6	273.5	378,6	478,0	484,7	3,9	7,1	6,1	6,5	5,8	6,4	5.0
Brazil	35.815,1	93.093,6	102.196,4	108.006,6	117.943,2	123.430,6	506,2	691,8	1.071,0	1.090,3	4,5	7,7	10,9	9,8	5,7	9,2	4,7
Colombia	6.130,6	12.458,6	13.209,3	13.793,9	14.415,6	15.136,3	398,2	496,6	598,0	611,3	4,7	5,8	6,2	6,0	4,4	4,5	5,0
Costa Rica	82[illegible],1	1.823,7	1 924,8	1.965,3	2.049,8	2.191,2	656,4	855,7	1.014,7	1.048,4	4,6	7,4	6,1	5,5	2,1	4,3	6,9
Chile	8.200,7	13.153,7	13.898,2	12 329,3	12.887,1	13.995,4	1.064,9	1 353,9	1.325,8	1.313,4	5,0	3,9	-0,3	5,7	-11,3	4,5	8,6
Ecuador	1.342,6	3.179,2	3.653,2	3.777,9	4.048,6	4.382,8	309,6	404,2	589,1	618,3	5,3	6,1	10,3	14,9	3,4	7,2	8 3
El Salvador	1.046,5	2.108,0	2.243,4	2.337,4	2.447,3	2.567,2	431,0	528,6	579,1	603,3	6,9	4,5	5,2	6,4	4,2	4,7	4,[illegible]
Guatemala	2.124,3	4.392,3	4 672,3	4.763,4	5.126,1	5.541,1	538,7	711,7	851,[illegible]	898,4	5,3	5,8	5,6	6,4	1,9	7,6	8,1
Guyana	279,9	403,4	421,7	452,5	460,7	443,6	498,1	558,0	571,6	537,6	3,3	4,0	2,9	4,5	7,3	1,8	-3,7
Haiti	859,1	801,0	828,2	838,7	874,7	896,6	187,2	171,0	187,4	188,8	0,7	1,0	3,0	3,4	1,3	4,3	2,5
Honduras	711,7	1.279,8	1.287,7	1.294,6	1.380,0	1.488,9	366,2	463,0	489,2	514,0	5,0	4,2	3,1	0,6	0,5	6,6	7,9
Jamaica	1.634,1	2.911,3	2.850,7	2.823,0	2.628,7	2.497,3	1.013,1	1.461,5	1.285,4	1.203,5	4,[illegible]	5,9	0,7	-2,1	-1,0	-6,9	-5,0
Mexico	23.451,1	55.172,3	58.428,8	60.812,6	62.105,9	63.850,9	671,5	911,6	991,4	997,9	7,2	6,9	5,7	5,9	4,1	2,1	2,8
Nicaragua	692,0	1.534,9	1.732,6	1.763,6	1.873,4	1.992,4	487,3	722,2	844,6	656,9	10,1	3,8	5,6	12,0	1,8	6,2	6,4
Panama	809,9	2.144,8	2.201,1	2.214,9	2.215,7	2.250,6	762,6	1.214,9	1.289,0	1.270,8	8,2	7,7	5,0	2,6	0,6	0,0	1,6
Paraguay	601,6	1.107,7	1.199,4	1.259,7	1.354,4	1.464,2	351,8	420,1	494,5	520,5	4,8	4,2	6,1	8,3	5,0	7,5	8,1
Peru	6.310,2	12.453,0	13.446,5	14.020,3	14.497,3	14.548,3	629,6	809,6	911,3	889,4	6,4	4,9	5,2	8,0	4,3	3,4	0,4
Dominican Republic	1.470,4	3.359,6	3.592,2	3.794,8	4.035,8	4.168,3	484,3	594,9	832,8	837,3	3,1	7,7	9,5	6,9	5,6	6,3	3,3
Trinidad and Tobago	864,4	1.376,0	1.353,4	1.373,0	1.451,3	1.510,8	1.040,1	1.247,5	1.307,5	1.328,7	4,9	3,2	1,4	-1,2	1,0	5,7	4,1
Uruguay	2.946,9	3.311,7	3.414,7	3.566,4	3.659,0	3.787,2	1.187,6	1.289,4	1.315,3	1 330,7	0,9	2,3	0,8	3,1	4,4	2,6	3,5
Venezuela	10.122,9	20.501,0	21.699,6	22.826,6	24.520,9	26.531,6	1.376,9	1.756,7	1.983,7	2.083,0	7,3	4,6	4,8	5,8	5,2	7,4	8,2
Latin America	131.218,9	280.905,6	301.454,9	310.718,1	325.536,9	340.238,5	657,0	859,2	1.049,1	1.065,8	5,3	6,9	6,5	7,3	3,1	4,8	4,5

(a) At constant market prices for the base year used by each country. For Latin America, they were calculated by converting the national currency figures into United States dollars at 1976 purchasing power.
(b) Preliminary estimates.

Source: IDB, on the basis of official statistics of the member countries.

accelerating its rate of economic growth from 5.3 per cent in 1961-1965 to just over 12 per cent in 1971-1974, an upward trend that weakened sharply in 1975, but rebounded in the subsequent two years. The pace of economic growth of the Dominican Republic more than tripled from 3.1 per cent a year in 1961-1965 to 9.5 per cent in 1971-1975, but in 1977 it shrank to only 3.3 per cent, just above the rate of population growth. At the other extreme, several countries faced serious difficulties in maintaining their level of economic activity, and some of them even suffered a strong setback (Argentina in 1975 and 1976, Chile in 1975, Guyana in 1977 and Jamaica from 1973 to 1977).

Imports in general grew at a faster pace than the gross domestic product, representing an increasing proportion of the overall supply of goods and services which reflected the fact that Latin America was becoming more open to the world economy.

The slowing down of the growth rate of imports in 1976 and 1977 was the result of the temporary austerity measures or balance of payment adjustment policies applied in a number of countries in the region which faced external payments difficulties. Import restrictions were introduced or intensified in Bolivia, Brazil, the Dominican Republic, Jamaica, Panama and Peru. Brazil, which had increased its reliance on import restrictions during 1975, tightened control on imports by the public sector and suspended imports of a large number of items during 1976 and 1977. In July 1976, Jamaica began prohibiting a wide range of imports. Panama established quotas for several import items and imposed restrictions on imports by public sector institutions. Peru introduced a new and more restrictive system of import licensing in January 1977. Along with import restrictions, surcharges were also imposed in Bolivia, Brazil, Costa Rica, Mexico and Panama. Brazil, for example, extended until the end of 1977 the increases of between 30 and 100 per cent in customs duties applied in late 1975 to a wide range of imports, and Bolivia imposed a surcharge of 3 per cent to most imports in February 1976 and raised the surtax on luxury items. On the other hand, restrictions in imports were eased in Argentina, Chile, Colombia and Mexico. In Argentina, the import regulations were made much less severe, while in Mexico the significant increase in restrictions on the trade system introduced in 1975 was halted. Similarly, in September 1976 Chile replaced the list of authorized imports with a list of prohibited imports consisting of only a few items.

In the last 20 years, Latin America's exports of goods and services expanded at a relatively slow pace with the exception of 1968-1969 and 1972-1973, when exports benefited from favourable market conditions. The slow growth of exports has become a serious constraint to economic development in many Latin American countries. In the last few years, Latin American exports fluctuated in a pattern similar to that of world trade; that is, low growth in 1974, a contraction in 1975 and a strong upsurge in 1976. In 1977 Latin America's experience seems to have been somewhat better than that of the world as a whole.

The main reason for the improvement was the impressive performance of non-traditional exports, particularly manufactured goods. However, in both years the region's overall export growth rates were dominated by the achievements of Argentina, Brazil and Mexico. The dramatic surge in the combined value of the exports of these three countries alone contributed almost two-thirds in 1976 and over one-half in 1977 to the region's overall growth in each of those years.

Among the other countries in the region, export performance was more varied. Moderate improvements occurred in Chile and Venezuela, but by amounts insufficient to equal their peak 1974 earnings record. The most impressive gains in 1976 and

1977 took place in Haiti and the Central American coffee producers, and in Ecuador because of continued increases in oil exports and the price surge of cocoa.

Foreign trade developments of individual countries, particularly in the more recent years, reveal marked differences in their comparative trade balances (Table 6). Among the region's larger economies, the trade balances of four countries - Argentina, Brazil, Colombia and Mexico - have closely reflected the international economic situation, as well as domestic economic developments.

The general economic trends in the countries of the region described in the preceding pages have influenced the principal features of the book market and will, in one way or another, continue to do so. Although not always directly related to it, factors such as the general price level, balances of payments, particularly trade balances, the structure and growth of the gross domestic product and other indicators - an analysis of which would be beyond the scope of this chapter - undoubtedly affect the production and marketing of books and other aspects of the book market.

We should also consider trends in social development, for the characteristic evolution of the labour force and employment in Latin America has significant implications for the composition of a market.

Unemployment and underemployment mean loss of productive activity for the economy as a whole, but to the unemployed it means loss of income, less food, limited educational opportunities and less of all the basic items required to satisfy human needs. In many countries of Latin America, the unemployment rate is higher than in the United States and other industrial countries at any time in this century, including the depression.

Between 1960 and 1975, the growth of the labour force in the region was staggering. The projected increase to the year 2000 is equally impressive and is a major challenge to those whose task it is to ensure that an adequate number of jobs are available. The labour force is expected to grow threefold from 1960 to 2000 and to double between 1975 and 2000 (Table 7).

Brazil, Mexico, Argentina and Colombia are the four countries with the largest labour force, accounting for some 70 per cent of the total labour force of the region in 1975. Argentina, however, has one of the lowest labour force growth rates in the region, and by 1980 Colombia's labour force should be larger than Argentina's. The labour forces of Brazil, Mexico and Colombia are large and growing rapidly, and will have a great impact on the economies of these countries. The labour forces of such countries as Costa Rica, Guatemala and the Dominican Republic are smaller, but they have as great an impact on their less diversified economies as the labour force in larger countries, or even a greater impact, perhaps because the absorptive base is narrower.

Over the next 25 years there will be a net increase of 100 million workers in Latin America's labour force, due to the effects of the population increase, migration from the countryside to the cities and the increase in educational opportunities.

During the past 20 years there have been considerable changes in the sectors in which members of the labour force seek employment. In 1950 most workers were employed in agriculture, but by 1970 most were employed in industry and services.

The very high growth rate of women's participation in the labour force calls for changes in the structure of the labour force, and this will necessitate adopting a new approach to the problem of providing more job opportunities. The increased

TABLE 6

LATIN AMERICA: BALANCE OF MERCHANDISE EXPORTS (F.O.B.) LESS IMPORTS (C.I.F.), BY COUNTRIES, 1970-1977
(Millions of dollars)

Country	1970	1971	1972	1973	1974	1975	1976	1977+
Argentina	79	-133	36	1.036	295	-986	862	1.210
Barbados	-76	-91	-102	-120	-137	-122	-163	-199
Bolivia	37	11	17	41	186	-97	11	6
Brazil	-110	-819	-842	-906	-6.355	-5.045	-3.635	-1.090
Colombia	-61	-181	111	200	-102	222	668	1.153
Costa Rica	-85	-124	-94	-110	-280	-201	-185	-178
Chile	171	14	-85	212	328	-	393	-89
Ecuador	-39	-103	4	186	547	70	303	-119
El Salvador	22	-4	24	-16	-99	-69	45	26
Guatemala	13	-17	12	11	-118	-92	-45	87
Guyana	14	11	1	-39	16	7	-86	-45
Haiti	-16	-15	-26	-27	-55	-69	7	-5
Honduras	-43	1	19	5	-93	-92	-50	-52
Jamaica	-184	-217	-235	-285	-184	-315	-271	-60
Mexico	-1.032	-900	-836	-1.395	-2.614	-3.117	-2.057	-1.390
Nicaragua	-24	-27	28	-52	-185	-146	7	-123
Panama	-227	-259	-294	-340	-571	-539	-572	-550
Paraguay	-11	-17	3	6	-24	-28	-38	-53
Peru	427	149	153	89	-25	-1.310	-617	-205
Dominican Republic	-91	-116	-40	-47	-183	-7	-177	-211
Trinidad and Tobago	-40	-147	-170	-79	315	428	404	-438
Uruguay	-7	-33	2	43	-106	-171	-22	-65
Venezuela	797	1.059	742	1.891	6.894	2.801	2.361	276
Latin America (a)	-486	-1.957	-1.574	302	-2.551	-8.879	-2.587	-2.115

+ Provisional.

(a) Totals may not add because of rounding.

Source: IMF, International Financial Statistics, January 1978; ECLA (United Nations); and staff estimates.

TABLE 7

LATIN AMERICA: LABOUR FORCE, 1960-2000[a]
(Thousands)

	1960	1965	1970	1975	1980	1985	1990	1995	2000
Argentina	8.134	8.659	9.216	9.790	10.342	10.918	11.505	12.110	12.699
Barbados	91	89	90	98	107	115	125	133	143
Bolivia	1.288	1.425	1.587	1.787	2.012	2.281	2.598	2.985	3.419
Brazil	22.880	26.117	30.043	34.612	39.758	45.900	52.835	60.818	69.305
Colombia	4.873	5.587	6.561	7.678	9.010	10.644	12.478	14.601	16.881
Costa Rica	379	447	533	642	766	899	1.031	1.171	1.317
Chile	2.505	2.686	2.884	3.260	3.715	4.200	4.666	5.126	5.603
Ecuador	1.405	1.630	1.912	2.242	2.642	3.130	3.681	4.312	5.000
El Salvador	815	924	1.081	1.270	1.500	1.768	2.066	2.412	2.802
Guatemala	1.256	1.416	1.621	1.873	2.158	2.486	2.855	3.272	3.730
Guyana	173	187	204	242	288	341	391	442	493
Haiti	2.027	2.146	2.145	2.297	2.461	2.623	2.791	2.969	3.161
Honduras	590	684	780	905	1.059	1.249	1.472	1.726	2.009
Jamaica	608	630	636	672	749	858	966	1.071	1.171
Mexico	10.992	12.520	14.489	17.071	20.167	23.934	28.316	33.650	39.663
Nicaragua	457	516	591	691	811	951	1.139	1.358	1.605
Panama	358	419	495	567	650	747	850	967	1.090
Paraguay	577	644	728	844	985	1.151	1.338	1.552	1.789
Peru	3.127	3.453	3.851	4.473	5.214	6.125	7.186	8.405	9.740
Dominican Republic	903	1.020	1.164	1.355	1.591	1.881	2.225	2.625	3.068
Trinidad and Tobago	281	285	314	354	403	453	495	533	588
Uruguay	1.051	1.099	1.141	1.196	1.257	1.334	1.403	1.476	1.544
Venezuela	2.367	2.680	2.994	3.591	4.312	5.145	6.030	6.989	8.045
Total	67.137	75.263	85.060	97.510	111.958	129.143	148.442	170.705	194.845

(a) The labour force data in this and the following tables are mid-year medium-variant projections except where noted and conform to the United Nations standards for uniformity. Included in the labour force are all employed persons and the unemployed who are seeking work and covers employers, the self-employed, salary earners, wage earners, unpaid family workers, members of producers co-operatives, and the armed forces.

Source: International Labour Office, Labour Force Estimates and Projections, 1950-2000, Geneva 1977.

number of women entering the labour force will give rise to all sorts of questions, and this will mean that many aspects of the social involvement of firms and governments will have to be reassessed. Particular attention will have to be paid to new demands on social security systems, new views on work norms, new concepts in labour relations, the urgent need for vocational training, the increasing demands made of all stages of the educational process, and so on.

Until recently, employment problems did not receive much attention in Latin America. However, as countries advance in production in the industrial and service sectors and as urban areas become more densely populated, the results of unemployment are becoming more obvious. Population growth is causing increases in the labour force, and this is creating an urgent need for greater employment opportunities.

The traditional assumptions of economic growth have altered, beginning with the idea that "more" necessarily means "better"; and, as we have seen, the labour force is moving from the primary sector to that of industry and services.

3.1 Education

While socio-economic factors are not to be neglected, cultural background and levels of education are qualitative parameters which complement the demographic information given above.

In the last few decades, the educational systems in the region have shown an unprecedented dynamism, and their rates of expansion have been high. Naturally, these rates (shown for 1960-1970 in Tables 8 and 9) differ significantly from one country to another and even from one region of a country to another. However, the regional averages are a useful and valid means of indicating what all the countries have done in this field.

On the basis of an analysis of quantitative trends in the educational system, the following observations may be made:

(a) the rate of expansion was almost twice the rate of population growth in the age-groups corresponding to the three levels of education;

(b) the average enrolment rates for the region showed a significant improvement, for the percentage of the population served by the three levels rose from 42.3 per cent in 1960 to 56.5 per cent in 1970;

(c) the rate of increase in overall enrolment was higher in the first half of the decade; in the second half it dropped, except in higher education;

(d) Latin America was the region of the world with the fastest rate of expansion during the second half of the decade and the most sustained rate throughout the decade;

(e) the highest rates of growth were recorded in secondary and higher education, reflecting longer periods of schooling and smoother progress from one level of education to another;

(f) the greatest increase in secondary-school enrolments occurred in general secondary education (193%);

(g) female participation in enrolments (and in teaching staff) practically equalled male participation, at the primary and secondary levels of education, reaching the average recorded in developed countries;

TABLE 8

ENROLMENT TRENDS BY LEVEL IN LATIN AMERICA FROM 1960 TO 1970 (1)

NIVEL	ENROLMENT (in thousands)			NET INCREMENT	RATE OF GROWTH		GROWTH INDEX
	1960	1965	1970	1960-1970	1960-65	1965-70	1960-1970 (1960=100)
Primary	25.909	33.686	42.986	17.077	5,4	5,0	165,9
Total Secondary	3.778	6.463	10.528	6.750	11,3	10,2	278,7
General	2.440	4.250	7.182	4.733	11,7	11,1	293,3
Technical	971	971	2.475	1.504	10,5	9,2	254,9
Teacher training	358	358	871	513	11,5	7,2	243,3
Higher	545	545	1.541	996	9,5	12,4	282,8
Total	30.232	41.006	55.055	24.823	6,3	6,1	182,1

(1) Source: Unesco. Regional Office for Education in Latin America and the Caribbean. "Evolución reciente de la educación en América Latina. Avances, problemas, perspectivas". Santiago de Chile, 1975.

(h) at primary level, the number of teachers increased faster than the number of enrolments, so that the pupil/teacher ratio dropped from 34:1 in 1960 to 32:1 in 1970. This also brought about an increase in unit costs.

These facts are evidence of the recent efforts of the countries of the region to expand their educational systems so as to meet the demands resulting from population growth. However, there are still serious shortcomings. The goal of universal primary or basic education has not yet been attained in all the countries of the region, although it has been enshrined in the national constitutions and educational legislation of many of them since the nineteenth century.

None the less, the situation today is much better than in previous decades. The number of children not attending primary school was 15.6 million in 1950, 14.7 million in 1957 and 14.6 million in 1965. At present, one in five children does not attend primary school. This figure was one in two in 1950.

As has already been noted, absenteeism is prevalent among the socially excluded sectors and in outlying geographical areas that cannot easily be reached unless new educational strategies are put into practice.

Repetition is one of the major educational problems in the region, particularly in primary education. The highest percentage of repeaters - around 65 per cent - is recorded in the first three grades of primary education.

TABLE 9

STRUCTURE OF THE POPULATION AGED 15 AND OVER BY NUMBER AND TYPE OF SUCCESSFULLY COMPLETED YEARS OF EDUCATION, FOR SELECTED COUNTRIES, AROUND 1960 AND 1970

Successfully completed years of education	Regional		Paraguay		Nicaragua		Mexico		Panama		Argentina		Chile	
	1960	1970	1962	1972	1963+	1971	1960	1970	1960	1970	1960	1970	1960	1970
Nil	25,6	19,1	18,7	14,9	49,4	46,7	39,2	31,7	27,3	20,0	8,7	1,0	15,6	9,5
Primary education	59,8	60,1	68,6	68,8	45,6	38,9	53,1	55,0	52,8	54,2	71,2	67,6	55,0	60,0
1 to 3 years	27,3	22,7	40,8	34,5	29,5	18,4	29,9	27,9	16,4	16,4	25,1	16,7	20,0	15,0
4 or more years	32,5	37,4	27,8	34,3	16,1	20,5	23,2	28,0	34,4	37,8	46,1	50,9	35,0	45,0
Secondary education	11,4	14,5	7,7	18,7	4,4	9,4	6,6	10,1	17,5	22,0	14,6	19,0	24,2	22,3
Higher education	1,9	2,9	3,5	1,9	0,6	1,7	1,1	2,3	2,1	3,7	3,2	4,0	1,7	2,8
No information	1,3	3,4	1,5	0,7	-	8,3	-	-	0,3	0,1	2,3	0,4	3,5	5,4
Total	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0

ource: Sample data from the CELADE Data Bank.
In the case of Nicaragua, 1969, 1963 National Census.

Population aged 10 and over.

Dropping out is another serious problem confronting the educational systems in Latin America. Around 60 per cent of all primary school pupils fail to complete their course. In some countries this figure is as high as 80 per cent. Most drop out in the lower grades. Latin America is the region of the world with the highest dropout rates. The cumulative effect of absenteeism, repetition and dropping out (which occur mostly among the rural population and the socially-excluded urban sectors) is reflected in the educational level of persons above school age. Most of the 74 million young persons between the ages of 15 and 35 are undereducated; that is to say, they did not receive a complete primary education at the appropriate age and are not receiving an equivalent education through the adult education services.

The information available for six countries on the last year of education successfully completed by the population aged 15 and over (see Table 9) shows that the percentages differ significantly from one country to another. Such differences are also found within each of the countries; even in countries with more acceptable national averages, large areas have rates closer to those recorded in countries that are in a worse situation.

As has already been seen, the most serious manifestation of the low level of education is illiteracy. In 1970 one in every four (23.6 per cent) inhabitants of the region aged 15 and over admitted to being illiterate. Around 1960, the situation was more acute; one person in three (32.3 per cent) was illiterate. For some 20 years, the absolute number of illiterates has been virtually stationary at around 40 million adult illiterates, national averages ranging from 1.8 per cent to 80 per cent. Even in countries with acceptable national averages, very high illiteracy rates are recorded in certain areas.

In five of the seven countries for which national censuses in the seventies were used, the absolute number of illiterates rose, compared with the 1960 figures, even though adult education programmes were carried out in these countries during the decade.

Rural dwellers make up half the population of Latin America. But in nine countries of the region more than 75 per cent of all illiterates were living in rural areas in 1970.

In urban areas, the educational system discriminates against the socially-excluded population. Accordingly, in the large cities there are large numbers of dropouts, illiterates, uneducated or poorly educated workers and so on. The schools have been unable to meet the needs of people with widely differing cultural patterns who have settled in the urban centres. In some cases, school activities and educational content have exacerbated the conflict between people in these sectors - generally migrants from rural areas - and the rest of the urban population.

In quantitative terms, there is a marked disparity between the education supplied and the demand on the labour market. Unsuccessful attempts to implement manpower planning schemes have been made in several countries. These schemes have failed owing to their conceptual and methodological limitations; they have proved unable to cope with the complexity of the relationship between supply and demand on the labour market.

In secondary and higher education, more students take general cultural subjects and the humanities than scientific and technological subjects. For example, only 4 per cent of enrolments at these two levels are in agricultural education, in a region where agriculture is the mainstay of the economy, provides work for half the economically active population and contributes one-sixth of the gross domestic product. The result is that many qualified secondary-school leavers and university graduates seek work in the service sector, particularly in the public sector.

There is also a very acute distortion in qualitative terms. The rigidity of Latin American academic structures - many of which were established in the last century - and the obsolete nature of some of the courses and special studies offered in them do little to meet the requirements of the labour market.

The efforts of a number of countries to introduce a more functional relationship between education and employment have been seriously affected by the lack of employment policies which, within the context of broader economic and population policies, would make it possible to direct educational policy-making and planning into the right channels.

In regard to the latter point, it must be said that the countries of the region have made a very considerable financial effort in recent decades, although they have sometimes been unsuccessful or have failed to make the most rational use of the available resources. Table 10 shows how expenditure on education is related to the gross domestic product and the national budgets of the countries of the region for 1960 and 1970. All the countries considerably increased the resources allocated for education, and some of them even doubled the percentage of the GDP earmarked for the education sector. Estimates made by a number of economists appear to rule out the possibility of continuing to increase resources at the same rate. The countries of the region will very soon find themselves in a severe bottleneck that will call for new operational procedures and the allocation and use of resources designed to achieve a substantial reduction in the present unit costs.

The study of these questions does not necessarily involve statistical analysis. Valid conclusions can also be reached by considering the same data by means of other forms of appraisal. Thus, bearing in mind the differences which exist in the region, it can be seen that heterogeneity does not occur in large-scale situations only; it is also encountered on a smaller scale.

The educational objectives in the majority of Latin American countries are the elimination of illiteracy and the provision of a minimum of six years' compulsory primary education for every child of school age. Various means are used to attain these objectives. Countries with larger monolingual indigenous populations will have to make a greater effort to achieve the kind of results obtained in countries which do not have this problem. In countries where a large proportion of the population lives in low-density areas, a greater effort will also be necessary, since more schools will be required. In countries where the people have to expend all their energies on subsistence activities, fewer opportunities will be available.

The Conference on Free and Compulsory Education organized by the OAS and Unesco, which was held in Lima in 1956, may be said to mark the beginning of systematic action to attain specific objectives for the region. In 1962, these objectives were definitively formulated in the "Declaration of Santiago de Chile" which followed the Conference on Education and Social Development.

The number of enrolments in educational establishments subsequently soared, but book production did not increase on a comparable scale. As a result of the educational policy statements which arose out of these meetings, the governments of the region accepted the fact that educational investment was an essential factor in the socio-economic development equation. At that time, the education budget was below the level needed to meet the new requirements.

TABLE 10

RELATION BETWEEN EXPENDITURE ON EDUCATION, THE GDP AND THE NATIONAL BUDGET, BY COUNTRIES

Country	1960		1970	
	GDP	National Budget	GDP	National Budget
ARGENTINA	2,0	13,3	3,7	14,0
BARBADOS	3,6 (1962)	23,3 (1965)	6,4 (1969)	21,0 (1969)
BOLIVIA	1,6	19,4	3,1 (1969)	22,2 (1969)
BRAZIL	2,3	10,5	3,3	10,5
COLOMBIA	2,5 (1961)	25,9 (1961)	2,7 (1969)	25,5 (1969)
COSTA RICA	4,2	29,6	6,4 (1969)	35,0 (1969)
CUBA	7,2 (1962)	10,1 (1961)	7,5 (1968)	16,1 (1966)
CHILE	3,9 (1961)	14,8 (1961)	4,8 (1969)	10,6 (1969)
ECUADOR	2,6	21,0	4,0 (1968)	21,8 (1968)
EL SALVADOR	2,7	20,5	2,8	24,9
GUATEMALA	1,6 (1963)	16,7 (1963)	1,9 (1969)	17,5 (1969)
GUYANA	3,0	12,1	4,9 (1969)	13,1 (1969)
HAITI	1,4	11,1 (1963)	...	11,4 (1968)
HONDURAS	2,1	16,6	3,2	19,5
JAMAICA	2,5	16,4	4,4 (1969)	18,5 (1969)
MEXICO	1,3 (1961)	19,1 (1961)	2,6 (1969)	20,1 (1968)
NICARAGUA	1,4	14,5	2,3 (1971)	18,6 (1971)
PARAGUAY	1,4 (1959)	16,0	1,9	13,2
PERU	2,6	17,6	4,6 (1969)	23,4 (1969)
DOMINICAN REPUBLIC	1,3 (1961)	7,3 (1961)	2,8	16,3
TRINIDAD AND TOBAGO	2,4	10,7	3,1 (1968)	19,4 (1971)
URUGUAY	2,8 (1961)	26,4 (1967)	3,8	26,1
VENEZUELA	3,3 (1962)	14,5 (1962)	5,2	23,1
PANAMA	3,6	21,2	4,6	34,6

Source: Unesco. Regional Office for Education in Latin America and the Caribbean. "Evolución reciente de la educación en América Latina. Avances, problemas, perspectivas". Santiago de Chile, 1975.

Recent data indicate that, with but minor exceptions, the present situation is the same as in 1970, and that young people will continue to form the larger proportion of the population.

The decrease in the number of illiterates, the growing access to education at all levels and the constant increase in the demand for technology, coupled with the high population growth rates, will be a considerable challenge to the region in the field of book development. This applies particularly to books intended for use in education, which is seen today in terms of the transfer of technology. They are of vital importance at certain levels. Recent figures for book production indicate that insufficient attention has been paid to this urgent need. (See Tables 11, 12 and 13.)

TABLE 11

PRIMARY EDUCATION IN LATIN AMERICA

Country	Year	Number of institutions	Number of teachers			Enrolments			(A)
			Total	Female	% F	Total	Female	% F	
ARGENTINA	1976	20.590	199.256	184.376	53	3.601.243	1.769.842	49	18
BOLIVIA	1975	4.893	38.737	-	-	879.826	390.720	44	23
BRAZIL	1974	180.915	887.424	754.855	85	19.286.611	9.610.291	50	22
COLOMBIA	1975	31.451	131.211	-	-	3.953.242	-	-	30
COSTA RICA	1976	2.790	10.965	8.963	82	365.957	178.696	49	33
CUBA	1976	14.312	80.845	-	-	1.747.738	835.976	48	22
CHILE	1976	8.156	57.164	41.417	72	2.243.274	1.104.325	49	39
ECUADOR	1976	9.696	33.567	21.824	65	1.278.402	620.438	49	38
EL SALVADOR	1976	3.099	16.563	11.004	66	796.250	386.948	49	48
GUATEMALA	1973	5.912	16.163	10.038	62	571.308	253.196	44	35
HAITI	1971	2.083	7.472	4.262	57	337.027	149.603	44	45
HONDURAS	1976	4.698	-	-	-	483.210	239.617	50	-
MEXICO	1976	53.571	274.717	170.562	62	12.148.221	5.872.822	48	44
NICARAGUA	1974	-	-	-	-	328.900	166.250	51	-
PANAMA	1976	2.178	11.943	9.366	78	353.646	169.883	48	30
PARAGUAY	1974	-	16.401	-	-	454.900	-	-	28
PERU	1977	19.430	75.491	-	-	3.019.624	1.426.772	47	40
DOMINICAN REPUBLIC	1972	5.245	15.216	10.986	72	833.439	415.263	50	55
URUGUAY	1974	2.324	14.434	-	-	331.047	161.346	49	23
VENEZUELA	1976	12.369	94.218	-	-	2.203.574	-	-	31
BARBADOS	1976	-	3.175	-	-	33.990	16.975	50	-
GUYANA	1973	395	4.077	2.678	66	132.023	64.925	49	32
JAMAICA	1975	923	11.531	-	-	370.200	184.705	50	32
TRINIDAD AND TOBAGO	1973	473	6.693	-	-	211.979	104.780	49	32

Source: Unesco Statistical Yearbook 1977. Paris, 1978.

(A) Pupil/teacher ratio.

TABLE 12

SECONDARY EDUCATION IN LATIN AMERICA

Country	Year	Total Number of Enrolments	% Female Enrolments	General Education		Technical Education		Teacher Training	
				Total	% Female Enrolments	Total	% Female Enrolments	Total	% Female Enrolments
ARGENTINA	1976	1.283.056	52	445.397	62	837.659	48	-	-
BOLIVIA	1976	-	-	128.081	-	-	-	-	-
BRAZIL	1974	1.681.728	54	628.178	51	782.827	43	270.723	89
COLOMBIA	1975	394.074	-	1.017.587	-	308.823	-	67.664	-
COSTA RICA	1976	116.037	52	93.862	54	22.175	46	-	-
CUBA	1976	715.807	49	535.109	53	145.205	29	35.493	71
CHILE	1976	465.935	54	307.946	58	157.989	5	-	-
ECUADOR	1976	431.315	-	-	-	-	-	2.191	-
EL SALVADOR	1976	59.079	45	32.449	44	27.437	54	-	-
GUATEMALA	1973	104.494	42	-	-	-	-	-	-
HAITI	1971	-	-	27.001	34	-	-	-	-
HONDURAS	1975	51.896	-	36.956	51	-	-	-	-
MEXICO	1976	3.241.421	45	2.789.122	42	316.318	66	135.981	66
NICARAGUA	1973	63.200	-	57.800	-	3.900	-	1.500	-
PANAMA	1976	129.579	52	85.130	51	41.141	52	3.308	76
PARAGUAY	1974	71.600	-	67.900	-	3.700	-	-	-
PERU	1976	890.106	-	699.547	-	190.559	-	-	-
DOMINICAN REPUBLIC	1973	150.600	-	144.700	-	5.100	-	800	-
URUGUAY	1973	193.958	54	152.194	57	35.842	38	5.922	88
VENEZUELA	1976	710.434	3	-	-	-	-	19.863	90
BARBADOS	1976	28.677	51	-	-	-	-	-	-
GUYANA	1973	67.853	50	64.314	51	3.539	40	-	-
JAMAICA	1975	213.555	53	208.616	53	4.939	49	-	-
TRINIDAD AND TOBAGO	1973	-	-	30.943	52	-	-	-	-

Source: Unesco Statistical Yearbook 1977. Paris, 1978.

TABLE 13

UNIVERSITY AND OTHER FORMS OF HIGHER EDUCATION IN LATIN AMERICA (enrolments)

Country	Year	All institutions		A		B		C	
		Total	Female	Total	Female	Total	Female	Total	Female
ARGENTINA	1976	601.395	287.199	533.152	228.519	13.144	8.768	-	-
BOLIVIA	1976	51.585	-	34.585	-	17.000	-	-	-
BRAZIL	1976	1.316.640	-	1.316.640	-	-	-	-	-
COLOMBIA	1975	186.635	-	179.762	-	-	-	6.873	-
COSTA RICA	1975	32.928	-	32.483	-	-	-	445	-
CUBA	1975	82.688	-	82.688	-	-	-	-	-
CHILE	1975	149.647	67.400	149.647	67.400	-	-	-	-
ECUADOR	1976	180.013	-	180.013	-	-	-	-	-
EL SALVADOR	1975	28.281	9.468	26.909	8.931	176	53	1.196	484
GUATEMALA	1975	22.881	5.277	22.881	5.277	-	-	-	-
HAITI	1975	2.881	691	2.467	665	-	-	414	26
HONDURAS	1976	14.903	-	13.380	-	1.129	-	400	-
MEXICO	1975	520.194	-	-	-	-	-	-	-
NICARAGUA	1972	12.519	4.249	-	-	-	-	-	-
PANAMA	1976	30.642	15.260	30.642	15.260	-	-	-	-
PARAGUAY	1973	12.112	-	12.005	-	207	-	-	-
PERU	1976	190.635	62.124	183.233	59.459	7.402	2.665	-	-
DOMINICAN REPUBLIC	1975	-	-	-	28.628	11.773	-	-	-
URUGUAY	1975	32.627	14.313	32.627	14.313	-	-	-	-
VENEZUELA	1975	213.542	-	185.518	-	14.371	-	13.653	-
BARBADOS	1973	1.417	624	942	344	450	280	25	-
GUYANA	1973	2.307	771	1.509	400	686	353	112	18
JAMAICA	1973	8.413	-	3.608	1.717	2.129	1.655	2.676	-
TRINIDAD AND TOBAGO	1974	2.962	1.164	2.202	754	760	410	-	-

Source: Unesco Statistical Yearbook 1977. Paris, 1978.

A: Universities and equivalent institutions. B: Non-university teacher training.
C: Other non-university institutions.

CHAPTER II - INTELLECTUAL CREATION

1.1 The author and the protection of his rights

The first of the various processes involved in the production of any book is the act of intellectual creation, which has implications for every stage in the life of a work.

For the purposes of this study, "author" means any person engaged in creative work which is expressed in print. This explanation is given since we must avoid making distinctions based on differences which may be important in other respects but do not affect the creative act as such. Some people, for instance, distinguish between the terms "author" and "writer", pointing to differences that are ultimately not essential. In some cases, the term "writer" is applied to persons working in literary genres such as fiction, poetry or the essay, while the term "author" covers persons who produce other types of works such as technical or scientific textbooks or who are engaged in musical composition or dramatic writing, and so on. Legally speaking, such differences are immaterial.

These distinctions are usually made by unions or professional associations with a view to determining which persons are entitled to belong to a particular society; such bodies identify each kind of creative work from a professional standpoint.

The position of translators is similar to that of authors. They are all treated in the same way as are authors in all the specific legislation in force in the area, receiving the same degree of protection as do authors.

As far as we know, no detailed studies have been made as yet on the actual circumstances of authors and translators in Latin America. But it is a well-known fact that, in Latin America, few authors and translators can live on what they earn from their works or translations, and even these are to be found in only a handful of countries. In their own circles they are considered to be privileged, but practically all of them have devoted most of their lives to the creation of intellectual works, and they, if anyone, deserve to be called professional writers.

Until recently, one commonly heard people speak of the "Latin American literature boom", a reference to the fact that commercial success had led to the discovery, particularly in Europe, of a number of writers previously been unknown outside Latin America. This of course aroused interest in other authors and considerably improved the prospects for Latin American books in general. Although expectations have now declined somewhat, Latin America is still a virtually inexhaustible mine of themes and writers. With a view to enabling Latin American writers to make more of their potential, we shall study the book market in the region, which affords plenty of scope for more extensive publishing and need not be dependent on what is being done in other parts of the world.

It should also be borne in mind that the position of "vernacular" authors varies in the different countries of the region. Many authors use a local dialect which is spoken by so few people that their works are published by foreign publishing houses. Such authors can only be supported and their readership extended if their interests are properly protected by professional organizations.

Perhaps the main weakness in the sector lies in the fact that only the exponents of certain specialized fields or forms of artistic expression have ceased to be entirely dependent on their own resourcefulness and are represented or defended by professional associations that are in a position to take effective legal action against negligent or deliberate offenders. But apart from this the different stages of development of national legislations must be taken into account. Some countries have authors' organizations that represent authors on a genuinely professional level. Other countries merely recognize these organizations in the context of their general normative regulations. In certain countries, such organizations have no legal status as institutions and there is no legislation on the matter to provide a framework within which the sector could seriously defend its interests.

The Mexican Federal Copyright Law is one of the few examples of Latin American legislation in force which grants societies of authors the powers to represent their members (Art. 98) and recognizes that authors have special authority to act in matters affecting their rights (Art. 93 to 117). Similar provisions are contained in the Ecuadorian Copyright Law, Chapter IV of which deals with "societies of authors" (Art. 99 to 109). The Peruvian Copyright Law, however, deals only with the first aspect (Art. 151). Title VI of the Brazilian Copyright Law, which has been in force since 1973, contains provisions relating to "associations of owners of copyright and of related rights" (Art. 103 to 115), while the Copyright Law of Venezuela refers to "representative associations of authors" (Art. 61 to 64), without assigning them the scope or express powers mentioned in the legislations of Mexico and Ecuador.

The International Confederation of Societies of Authors and Composers (CISAC) has its headquarters in Paris. It is an international organization whose membership comprises practically all the bodies in the world engaged in the collection of royalties. It operates in Latin America through a regional body, the Pan-American Council of the International Confederation of Societies of Authors and Composers, which is based in Buenos Aires. The societies of authors which are affiliated to CISAC and also belong to the Pan-American Council of this organization are:

ARGENTINA: Argentine Society of Authors and Composers (SADAIC)
General Society of Authors of Argentina (ARGENTORES)
Argentine Society of Writers (SADE)

BRAZIL: Brazilian Society of Playwrights (SBAT)

CHILE: Society of Playwrights of Chile (SATCH)
University of Chile. Copyright Department

COLOMBIA: Society of Authors and Composers of Colombia (SAYCO)

MEXICO: Society of Authors and Composers (SACM)
General Society of Writers of Mexico (SOGEM)

PARAGUAY: Associated Paraguayan Authors (APA)

PERU: Peruvian Association of Authors and Composers (APDAYC)

URUGUAY: General Association of Authors of Uruguay (AGADU)

VENEZUELA: Society of Authors and Composers of Venezuela (SACVEN)

The Pan-American Council of CISAC has done invaluable work; it is one of the bodies which has done most to define the basic principles of copyright protection in the region.

Other associations of authors are registered in the region, but they are either merely royalty collection agencies, such as the Guatemalan Association of Authors and Composers (AGAYC) or, although legally established bodies, are not actually operational since they have no headquarters (as in the case of the Ecuadorian Society of Authors (SEA).

The situation regarding these problems is satisfactory in only a number of Latin American countries. With reference to the above-mentioned distinction between "authors" and "writers", it could be maintained that the former receive better protection, perhaps because they have succeeded in establishing organizations that are genuinely representative and financially sound. Another possible reason is that they have discarded the individualistic approach which is typical of "writers". In the Argentine Republic and Mexico there are different societies of authors for each kind of creative work. Judging by the results, this would seem to be the best way to represent, administer and protect the moral and professional rights and interests of authors and writers and to give them the special attention called for in each case and in each specialized field.

Other factors that should be noted are the poor organization and the limited powers of the state administrative body concerned with the registration of works, a function which is important both as a means of securing copyright protection and as a source of statistics. Besides this, legal proceedings connected with copyright protection are slow and costly, and there is little uniformity about the way in which the law deals with copyright infringements. In some cases, civil and criminal actions are provided for; in others, merely civil actions or actions for damages may be brought.

The establishment and operation of a Regional Copyright Information Centre is still pending. Such a centre could undoubtedly contribute to the solution of the serious problems that are periodically caused in the area by the unlawful reproduction of books, graphically termed "pirate publishing", and by reprography. It would be responsible for advising the governments of the region about the updating of regional copyright legislation and the organization of copyright registration and legal deposit offices. It would also make available to publishers lists of copyright owners and information relating to the assignment and negotiation of the respective rights.

An experiment which is producing excellent results is being conducted by the National Information and Documentation Centre of the Mexican Copyright Directorate. The establishment of similar organizations in the principal countries in the region is the first step that must be taken towards the establishment and operation of the regional body. The setting up of such national centres should be a definite and immediate objective. Moreover, it should be borne in mind that the various registration bodies, which have done much useful work in many Latin American countries, have considerable potential to offer. All that needs to be done is to implement a recommendation of the Inter-American Seminar of Copyright Experts, held in Lima in 1963, on the organization of copyright registration offices. According to this document, these offices should be responsible for the performance of all the following functions:

(a) information: copyright registration offices should immediately pass information on to the public authorities responsible for copyright protection and to any persons whose business it is to be informed of the legal status of works;

(b) regulation: copyright registration offices should ensure the observance of the rules and regulations established by law with a view to implementing the administrative aspects of legal protection;

(c) statistics: with a view to facilitating the rational assessment of the conditions relating to the creation of intellectual works and the protection afforded to them, registration offices should be responsible for the preparation of statistics on: (a) the number and nature of works registered; (b) contracts concluded in connection with intellectual work; (c) any other aspect of administration which is conducive to a knowledge of activities relating to authors and their works; (d) research; through their advisory services, registration offices should promote the improvement of legislation governing copyright protection, and to this end they should receive sufficient financial support from the state to enable them to use the services of specialized libraries, information exchange services and expert personnel.(1)

2.1 Copyright protection

The Berne Convention (1886) was the first international instrument that sought to protect intellectual works beyond the frontiers of the country in which they were created. This convention and others based upon it had a decisive influence on the attitude of Latin American countries to copyright protection. Most of these countries harboured a certain distrust of this international instrument; they saw it as a European system of protection which of course did not take Latin American conditions into account.

Such was their opposition to this instrument that they sought other solutions in the form of regional instruments. Accordingly, a system of inter-American and international copyright protection was built up on the basis of a network of bilateral and multilateral agreements and conventions. Multilateral relations began with the Treaty on Literary and Artistic Property, signed in Montevideo in 1888-1889, which adopted, in general terms, the principle that the nature of a copyright should be determined and the copyright granted on the basis of the national laws of the country of origin. The Treaty of Montevideo was followed by the Convention on Literary and Artistic Copyright, signed in Mexico City in 1902.

The regional instrument to which the largest number of countries have acceded is the Convention on Literary and Artistic Copyright, signed at the Fourth American International Conference, held in Buenos Aires in 1910. The Inter-American Convention on the Rights of the Author in Literary, Scientific and Artistic Works was signed in Washington in 1946. Table 14 shows the main instruments by which the countries of the region are bound.

In view of the proliferation of such treaties, not to speak of bilateral treaties between different countries, and the fact that an insufficient number of Latin American states had acceded to the Berne Convention, Unesco decided that it should draw up a much simpler convention which would to some extent smooth out differences and harmonize the various conflicting interests. The Universal Copyright Convention was accordingly signed in Geneva in 1952, with a view to removing some of the problems existing between the countries of America and the countries of the Berne Convention.

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(1) CISAC, Second Inter-American Meeting on Copyright - Lima 1963, Pan-American Council of CISAC, Buenos Aires 1963.

Table 14

Documents, Acts, Agreements, Charters, Conventions, Declarations, Resolutions signed by the countries of Latin America and the Caribbean

Years	Documents	States and dates of independence 1816 Argentina	1966 Barbados	1825 Bolivia	1822 Brazil	1818 Chile	1810 Colombia	1821 Costa Rica	1901 Cuba	1821 Dominican Republic	1830 Ecuador	1821 El Salvador	1974 Grenada	1821 Guatemala	1966 Guyana	1804 Haiti	1821 Honduras	1962 Jamaica	1821 Mexico	1821 Nicaragua	1903 Panama	1811 Paraguay	1821 Peru	1962 Trinidad and Tobago	1825 Uruguay	1811 Venezuela
1889	Montevideo Copyright Convention	X		X																		X	X		X	
1902	Mexico City Copyright Convention							X		X		X		X			X			X						
1906	Rio de Janeiro Copyright Convention				X	X		X			X	X		X			X			X	X					
1910	Buenos Aires Copyright Convention	X		X	X	X	X	X		X	X			X		X	X			X	X	X	X		X	
1911	Caracas Copyright Agreement			X							X												X			X
1928	Havana Copyright Convention							X			X			X						X	X					
1945	Charter of the United Nations	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
1946	Washington Copyright Convention	X		X	X	X	X	X	X	X	X			X		X	X		X	X		X				
1947	United Nations General Assembly Resolution 110 (II) of 3 November	X		X	X	X	X	X	X	X	X	X		X		X	X		X	X	X	X	X		X	X
1948	General Agreement on Tariffs and Trade (GATT)	X	X		X	X			X	X			X		X	X		X		X			X	X	X	
1948	Berne Convention Brussels Act	X			X	X													X						X	
1948	Agreement for facilitating the international circulation of visual and auditory materials of an educational, scientific and cultural character (Beirut)				X			X				X				X								X		
1948	Universal Declaration of Human Rights	X		X	X	X	X	X	X	X	X	X		X		X			X	X	X	X	X		X	X
1950	Agreement on the importation of Educational, scientific and cultural materials (Florence)		X	X					X			X		X		X				X				X		
1952	Universal Copyright Convention	X			X	X		X	X		X			X		X			X	X	X	X	X			X
1958	Convention concerning the international exchange of publications				X				X	X	X			X							X					
1961	International convention for the protection of performers, producers of phonograms and broadcasting organizations				X	X		X			X								X			X				
1965	International Telecommunication Convention and its Radio Regulations (Montreux - 1965)	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X	X
1966	Treaty on Principles Governing the Activities of States in the Exploration and Use of Outer Space, including the Moon and Other Celestial Bodies (UN Assembly General Resolution 2222 (XXI))	X	X	X	X	X	X			X	X	X			X	X	X	X	X	X	X		X	X	X	X
1970	Convention on the means of prohibiting and preventing the illicit import, export and transfer of ownership of cultural property	X			X					X	X								X		X					
1971	Universal Copyright Convention as revised at Paris - 24th July				X														X							
1971	Convention for the protection of producers of phonograms against unauthorized duplication of their phonograms	X			X						X								X		X					
1974	Convention relating to the distribution of programme - carriyng signals transmitted by satellite	Nil																								

Source: Unesco, Intergovernmental Conference on Communication Policies in Latin America and the Caribbean, San José (Costa Rica), July 1976.

As part of the preliminary negotiations for the establishment of the Universal Convention, a meeting of Pan-American Union experts was held with a view to ensuring agreement on the harmonization of the Pan-American conventions with the Universal Convention. The clause which was drafted at that meeting and approved by the American governments was subsequently incorporated in Article XVIII of the Universal Convention. This article stipulated that the Pan-American conventions were not to be abrogated and that the Universal Convention would prevail only in the case of conflict between the conventions. However, the Geneva Convention does not contain any provisions which substantially modify or alter any provision of the American instruments.

The Universal Copyright Convention has been ratified by those countries with the largest publishing industries, though not by all the countries of the region. Thus, the main publishing centres of Latin America are united, in both regional and international terms, in the provision of copyright protection among themselves and between them and their main European suppliers (Spain, Portugal, France, the Federal Republic of Germany, the United Kingdom, etc.).

It should be noted that the few Latin American countries that are members of the Berne Union have the largest publishing output; most of these countries are bound by regional conventions or by the Universal Convention, as may be seen from Table 14. Only three countries of the region have ratified the Geneva Convention, as revised in Paris in 1971. It is therefore to be inferred that the countries of the Berne Convention will not apply the Geneva Convention and that only those signatories of the Geneva Convention which are not members of the Berne Union may be considered to be bound by the Geneva Convention. The new Berne system has been in force since 10 October 1974, and the system introduced under the Geneva Convention has been in force since 10 July of the same year. According to the protocols of 1971, the Geneva Convention has been ratified by Mexico, Colombia and Bolivia, which are therefore in a position to enact legislation relating to the licences provided for in the convention with respect to works published in countries that are members of the system and have also acceded to the aforementioned provisions. Only Mexico has acceded to the Berne Union Convention, as revised in Paris in 1971.

The copyright situation in Latin America has developed within this framework, which is defined by instruments such as the Berne and Geneva Conventions that deal specifically with authors' rights. In recent years, an increasing number of countries have acceded to one or both of these conventions. It has gradually become clear that the countries of the region cannot remain on the sidelines of international developments in the field of copyright, since this is a right that protects authors, their works and the cultural heritage of mankind. A country that is internationally isolated in copyright matters lays its own authors open to unrestricted and uncontrollable exploitation of their works beyond its borders.

3.1 Access to copyright

One of the most important questions connected with the normative aspects of copyright bears upon the availability of the copyright, for it concerns the "raw material" par excellence for the production of books.(1)

The most usual and direct way of securing the right to publish the work of an author is that envisaged in the publishing agreement. The latter is an expression of the authority of the author, inasmuch as it is the means by which he exercises a moral right, through his decision to publish his work, and a pecuniary right, through his agreement with the publisher on the formalities of the economic benefit accruing to him from the work.

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(1) BOTTARO, Raúl H. Disponibilidad del Derecho de Edición en América Latina. Buenos Aires, Ed. Depalma, 1979.

The limitations placed by legislation on the pecuniary right of authors include, in the first place, the provisions governing the duration of this right. Upon the expiry of the term, granted by the law, after the death of the author, his work enters the public domain. This means that, without any need to obtain the authorization of his successors in title, a work may be published and disseminated by any publisher, who must in all circumstances have regard for the moral right of the author, which is inalienable and perpetual.

All the national laws refer to the public domain, and in the Latin American countries there are various ways in which a work acquires this status. We need not consider each of these laws in detail, but merely note that the periods of copyright protection after the death of the author vary considerably, from 25 years (Haiti) or 30 years (Bolivia, Chile, Mexico and the Dominican Republic) to 80 years (Colombia, Panama) or an unlimited period for direct successors (Brazil). Various distinctions and exceptions have to be made, of course, according to the degree of succession, the nature of the work and so on.

The situation has been complicated beyond all measure by the variety of terms of protection, the different procedures adopted in the various laws with a view to establishing the scope of the public domain, the different ways of treating posthumous works, anonymous works, pseudonymous works, works belonging to public corporations or juristic persons, the status of a copyright depending on whether heirs are alive at the time of death of the author and, consequently, whether this right enters the public domain or is retained by the state, and the problems arising, within the public domain, in connection with the nationality of the author and the place of publication of the work.

We believe that the above observation has important implications. It indicates the need for awareness of the existence of this body of inconsistent legal provisions and calls attention to the necessity of adopting standard legislation which will form a sound basis for the introduction of more systematic measures to ensure that such a widely applicable right is applied with entire uniformity.

It should also be borne in mind that the positive law of Argentina, Brazil, Chile, Mexico and Uruguay provides that the use of works in the public domain for profit-making purposes must be paid for. The availability of the work to the publisher enables the public authorities to levy what is referred to as a "fee" in Uruguay, a "royalty" in Argentina and a "percentage" in Brazil. This arrangement has become known by the controversial name of "domaine public payant". Under this system, which does not involve any time-limit, the user of a work no longer protected by copyright is obliged to pay a fixed sum, by way of compensation, to a legally authorized body, the money collected being used for cultural or community activities.

The "domaine public payant" should be distinguished from the licences that authorize the reproduction of a work while it is in the private domain, that is to say, before the expiry of the limited period of protection.

Publishing licences apply to a work which has already been published; they are a legal remedy based on considerations of cultural interest. They are granted regardless of the express will of the author or the copyright owner, subject to the payment of fair compensation. When the amount of compensation is assessed in advance, the licence becomes binding.

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Licences are derived from local law or international law, the origin of which lies in the two major international copyright conventions mentioned above - the Geneva Convention and the Berne Convention.

On the basis of a survey of the local legislation in force in Latin America, the systems under consideration may be grouped as follows:(1)

(1) laws such as those of Chile, Guatemala, Haiti, Honduras, Paraguay, the Dominican Republic and Uruguay do not provide for any licence related to the field we are concerned with;

(2) laws such as those of Bolivia, Nicaragua, Peru and Venezuela provide for the expropriation of copyright for reasons of public utility in order to publish a work; it is to be assumed that, under the legislation of these countries, certain cases are not covered by the licensing system;

(3) the Brazilian law on this matter incorporates licences derived from international conventions;

(4) Argentine, Ecuadorian and Colombian legislation includes identical provisions which authorize the reproduction of a work with a view to publishing a new edition if the heirs of an author or copyright owner fail to do so. Provision is made for the payment of pecuniary compensation in such cases.

(5) Under the legislation of Mexico and El Salvador licences may be granted in special circumstances (if the work is untranslated, out of print or sold at an unreasonably high price, for instance).

These considerations suggest that licences for translation or reproduction, which were approved at the Diplomatic Conference of Paris (1971), are a perfect example of the practice of "making the right public", which is found in all areas of legislation. This Conference met at the same time, although in a separate session, to revise the Universal Copyright Convention (Geneva, 1952). Both aspects were incorporated in the convention which created the Berne Union for international copyright protection, with a view to making its provisions more flexible.

It is worthwhile recalling that the 1952 version of the Universal Copyright Convention provides for a licence, which is retained in the revised convention of 1971, for the translation of certain works, in accordance with the requirements of Article V. It is not dependent upon the stage of development of the user country, as is the case in the Paris texts.

Developing countries considered that the difficulties connected with the granting of copyright impaired their ability to avail themselves of protected works. Their views were first expressed at the Stockholm meeting (1967), which set in motion the machinery that produced the revised versions of the Universal Convention and the Berne Convention in 1971.

In these revised versions, special conditions were agreed with a view to facilitating the access of developing countries to protected works. The revised terms have reference to the duration of the rights of translation, reproduction and radio broadcasting, and special facilities for the use of protected works for teaching, study and research.

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(1) Bottaro, ibid.

The results of such revision still fall short of the aspirations of developing countries. Cases involving a licence are bound up with the development of local legislation on copyright protection and depend, to some extent, on the stage of development of the local publishing industry and its experience of copyright negotiation. Such is the case in Latin America where, despite the fact that the countries concerned are developing countries, albeit with different levels of competence in publishing, government authorities and publishers have not been in favour of the licensing procedure and consider that the revised versions of 1971 meet their needs.

CHAPTER III - PUBLISHING

1.1 General considerations

The various stages of the publishing process meet different needs that reflect the broad range of activities involved in the publication of a literary, scientific, educational, artistic or informational work, which is generally printed on paper. The underlying structure of publishing is made up of these various activities, which are all centred around the production of the work in question. The publishing process is also called the "publishing industry", a term which denotes the manufacturing and commercial aspects of publishing. This applies to anything produced as a result of such activities, whether it be a book, a magazine, a newspaper or anything else that is reproduced in print. This study is concerned with books and related areas of publishing.

Before examining the situation of publishing in the different countries of the region, we shall briefly describe some of the salient features of the Latin American publishing industry, on which our conclusions will be based.

Some controversy has arisen about the nature of publishing. It can be seen as a commercial enterprise or as an industrial activity. It is important that it should be classified correctly, since the publisher's status as a trader or an industrialist will determine the way in which he is treated for credit and tax purposes and his entitlement to benefit from various promotional schemes. The correct classification of publishing will also serve to determine the appropriate legal framework for firms and the scope of other normative provisions.

Originally, publishing was not distinguished from printing and bookselling. Although the activity of the publisher subsequently diverged from that of the printer and the bookseller, it was not always possible to demarcate the province of each, since some publishers were also printers or booksellers, while some booksellers turned their hand to publishing.

Because of such combinations of functions it has been difficult to get a clear idea of the role of the publisher. The craft phase of publishing, when everything was improvised and uncertain, gradually gave way to a fully-fledged industry. Printing introduced important technological changes, which called for specialization. Printing from movable type led to an increase in production, so that booksellers began to play an independent role, concerned exclusively with the distribution of books. The process of producing books on a larger scale grew more complex, until book production eventually became an industrial operation.

Industrialization is not an inherent aspect of publishing; it is the necessary outcome of a combination of creative activity and transformation. A book is the product of a combined process designed to transform a work which can be reproduced by printing conventional signs into a set of identical copies of the original material, using a medium - usually paper - and the necessary services involved in fixing such signs.

The publishing process, which takes place in technically programmed sequences, is therefore an industrial operation aimed at making a product - a book - by transforming the constitutive elements of all the stages involved (original material, paper, printing services, and so on) and distinguished from all of these elements to the extent that such a transformation occurs.

A publishing company has to be more industrial than commercial; publishing may be described as a decentralized industrial activity(1).

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(1) GARCIA, Eustasio A., Desarrollo de la Industria Editorial Argentina, Buenos Aires, Fundación Interamericana de Bibliografía Franklin, 1965.

The publisher must know and understand the market. He must also have enough capital to acquire the materials needed for the different stages of the process, all of which he co-ordinates and which are entirely his responsibility.

A definition of the publisher's role which reflects this view accurately is contained in a study produced jointly by a number of Brazilian publishers' organizations. It states that a publisher is a "natural or artificial person" who, on his own account or with due authorization, transforms into books original material chosen or commissioned by him and co-ordinates the creative work of authors with that of editors, illustrators and others engaged in book production and also with the industrial processes required for the reproduction of the original material, with a view to subsequently promoting the sale of the work.(1)

From this summary of the publisher's role it will be seen that the apparent lack of specialization means that the publisher has to build up a broad range of knowledge which will enable him to deal with both the intellectual demands of publishing and the production and marketing side of the business.

One of the distinctive features of the publishing industry is that it has a slow turnover and relies on a complex process of capital investment with an uncertain return. It takes years for the publishing industry to recoup an investment. If it is to thrive, or even survive, it needs large-scale international markets and a measure of linguistic uniformity. Publishing activities must therefore be planned methodically, and a strategy based on such planning must be worked out.

The decision to publish a work entails more than a mere appraisal of manuscripts. It calls for knowledge of the wishes and motivations of the intended readership and of their socio-occupational categories and ages. The publisher also needs a detailed knowledge of the different distribution channels; he must make a careful study of commercial information about sales in the past and of the relevant population statistics, and arrange for surveys to be carried out.

Publishers must compare the planned publication with similar works published by their competitors, in terms of content, quality and price. They must investigate the potential market and study the consumer and his habits. They must find out who their potential buyers are, where they live and how many of them there are, how great their need of the new book is, how they satisfy their need for such material at present, what rival books are available and how they sell, whether they will have to make a special effort to convince the public to buy the book, what the buying power of the target readership is, and what persons are likely to influence the buyer - wife, husband, children, teacher.

Publishing calls for sound editorial skills (a knowledge of authors), a good grasp of book design (aesthetics, the combination of text and image) and a knowledge of book production (manufacturing costs) and of the best distribution channels for the work. This presupposes an understanding of the problems involved in publishing, what can be done and what it will cost. In other words, it presupposes a knowledge of communication rather than a subjective approach to publishing (that of publishers who have a "nose" for a good book or who work by intuition.

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(1) UMA POLITICA INTEGRADA DO LIVRO - Câmara Brasileira do Livro - Sindicato Nacional dos Escritores de Livros, Rio de Janeiro, 1976, Volume I.

A modern publishing company must apply the principles of sound management; it must plan so as to actually make the sales that are forecast, and its budget must show investments and results.

In present-day circumstances, there is no other way of deciding what to publish, how much of it to publish and how to go about publishing it.(1)

2.1 Regional characteristics

We have tried to see what are the main features of a modern publishing industry. Generally speaking, only some Latin American countries can be said to possess such an industry, and then only on a small scale; for, as we have pointed out in another context, differences in the level of development and in other matters are to be found throughout the region as a whole and in each country, and this is true of publishing as of other spheres.

Countries such as Argentina, Brazil and Mexico have highly developed book industries whose output is, comparatively speaking, satisfactory in quantitative and qualitative terms. A larger group of countries, such as Colombia, Chile, Cuba, Peru, Uruguay and Venezuela, make a small contribution to the overall publishing output in the region. They are followed by the other countries in which, according to the statistics, very little publishing is done, as may be seen from the table below.

Notwithstanding such dissimilarities, there are certain recurring traits which are characteristic of the publishing industry throughout the region.

In general, the multi-faceted nature of this industry rules out any kind of watertight classification in the matter of publishing, particularly in terms of exact specialization. In Latin America, the roles of "publisher" and "bookseller" are usually combined and are frequently linked to those of "printer" and "distributor". While this is by no means the universal practice, it is common, particularly in countries where publishing has been largely neglected. Such a lack of specialization among the companies operating in the book trade indicates the poor state of development of the different aspects of the book trade in the area.

This situation is reflected, for instance, in Argentine legislation, which recognizes the multi-faceted nature of the book trade in an explicit provision of Law No. 20.380, known as the Argentine Book Law. Article 22 of this law states that:

> "The benefits established under the terms of this law may be enjoyed by the following types of firm:
>
> (a) single-activity firms: those engaged in a single activity (printing, bookbinding, publishing or bookselling);
>
> (b) semi-integrated firms: those engaged simultaneously in activities listed in paragraph (a) and others not listed in that paragraph;
>
> (c) integrated firms: those engaged simultaneously in two or more of the activities listed in paragraph (a).

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(1) ROBLES, Ricardo Pascual, La Decisión Editorial, Primer Curso Latinoamericano de Producción y Administración Editorial, CERLAL, Bogotá 1971.

In the case of semi-integrated or integrated firms, only the particular activity corresponding to each heading will be taken into account, the benefits granted being allocated solely for that activity".

This provision obviously recognizes that publishing, printing and bookselling may be combined, or they may be complementary or separate activities. At the same time, it seeks to give each branch of the trade a separate identity, which is most desirable, for it helps to raise the level of professional specialization and to ensure the observance of the legal provisions governing the activities of printers, publishers and booksellers as defined in Article 21 of the abovementioned law.

Table 15, which refers to the year 1960, shows the extent to which these conditions are found in the region. It provides statistical information based on a system of classification which reflects the observation made earlier in this chapter.

In many cases, moreover, firms in each category engage in two or three main kinds of activity. This makes it extremely difficult to determine the number of publishers who at the same time operate as distributors and agents - importers - or to distinguish the latter from the former and from booksellers. Functions are sometimes combined, and it is difficult to establish watertight categories, owing to what we have already described as the salient feature of the publishing business in the region - the lack of that professional specialization which the establishment of a modern publishing company requires. The region we are concerned with is unlike highly developed countries, in that production is not concentrated in a handful of publishing companies, nor is there any significant concentration through co-ordinated production or the integration of firms (mergers, shares, etc.) or through co-publishing projects. A Latin American publishing house is still a highly individualistic enterprise; most publishing firms are family businesses or close corporations.

Other characteristics of the publishing business in the region are reflected in the opinions of the seminar on the "Role of the Book in Change Processes in Latin America" held in Costa Rica in 1974.

The principal opinions expressed were:

1. There is a lack of communication among Latin American publishers, who do not know what books are being produced in the region, and the demand for books is decreasing accordingly.

2. Because publishing companies are extremely scattered and not consolidated, the publishing trade in general, with the exception of the large publishing companies, has failed to achieve the levels of productivity required for the large-scale production of books which the Latin American masses can afford.

3. Publishing is affected by the existence of numerous customs and tariff barriers, the inefficiency of the postal services and, in several countries, censorship and restrictions on the entry of certain publications.

4. There is no proper book marketing infrastructure to provide a basis for advertising and publicizing new books and for distributing them through an efficient network of branch offices, distributors, sales agents, etc.

5. The book industry is affected by monetary problems which increase the price of books and in some cases actually prevent free trade between the different countries.

6. Editions are small because of the limited trade opportunities. This increases costs and therefore leads to higher book prices.

TABLE 15

PUBLISHERS, PRINTERS, DISTRIBUTORS AND BOOKSELLERS, BY CATEGORY AND FUNCTION

	Booksellers	Booksellers and Publishers	Booksellers Publishers and Printers	Booksellers and Printers	Publishers	Publishers and Printers	Printers	Distributors	Distributors and Booksellers or Publishers	Total
ARGENTINA	98	39	12	-	128	11	11	2	4	295
BARBADOS	-	-	-	-	-	-	-	-	-	-
BOLIVIA	18	2	2	2	4	10	11	-	-	36
BRAZIL	105	61	4	-	107	12	-	3	15	301
COLOMBIA	101	2	1	5	60	14	2	-	-	185
COSTA RICA	8	-	3	-	3	2	1	-	-	17
CUBA	41	6	4	5	15	10	3	-	1	85
CHILE	64	9	5	16	10	1	-	-	1	106
ECUADOR	29	-	2	3	6	12	4	-	-	56
EL SALVADOR	24	-	-	2	4	1	7	-	-	38
GUATEMALA	13	1	2	3	2	5	1	-	-	27
GUYANA	-	-	-	-	-	-	-	-	-	-
HAITI	7	-	2	-	-	-	3	-	-	12
HONDURAS	6	-	-	-	4	1	7	-	-	18
JAMAICA	-	-	-	-	-	-	-	-	-	-
MEXICO	112	17	3	3	116	6	2	5	17	281
NICARAGUA	7	-	2	1	4	4	-	-	-	18
PANAMA	25	-	-	-	6	4	6	1	-	42
PARAGUAY	15	1	-	4	1	3	4	-	1	29
PERU	23	5	6	9	6	10	1	1	-	61
DOMINICAN REPUBLIC	10	1	1	1	2	9	2	-	-	26
TRINIDAD AND TOBAGO	-	-	-	-	-	-	-	-	-	-
URUGUAY	36	8	2	7	9	6	10	-	3	81
VENEZUELA	51	8	2	1	16	13	4	-	2	97
TOTALS	811	161	54	65	504	120	125	11	44	1.895

Source: JENNISON, Peter S. and KURTH, William H., Books in the Americas, A Study of the Principal Barriers to the Book Trade in the Americas, Pan-American Union, General Secretariat, OAS, Washington, D.C., 1960.

7. The costs of all the inputs of the publishing industry have increased in recent years - by approximately 300 per cent between 1970 and 1974 - but no short-term or long-term measures have been taken to deal with the situation.

8. The public sector has generally failed to grasp the strategic importance of the publishing industry in manpower training, and has therefore played practically no part at all in publishing activities and has failed to adopt policies and introduce legal provisions designed to encourage, promote, assist and develop the book industry.

9. The inadequate bargaining power of the scattered and disunited publishers and their consequent inability to deal with this situation calls for the adoption of co-operative measures to overcome the basic problems mentioned and at the same time to open up the possibility of forging closer links and improving cultural relations between the various countries.

Lastly, to conclude this account of the publishing industry we must draw attention to a number of points the importance of which is not always realized.

When the publishing industry attained significant dimensions in Latin America it became a typical substitution industry. It was first established in the years following the Spanish Civil War and expanded considerably in the period immediately after the Second World War. It has all the good and bad characteristics of substitution industries. With a view to meeting the needs of an existing market, previously supplied from outside the region, publishers and printers set up in business in Latin America, where they generally introduced the patterns of production, taste and prestige of the European countries whose production they sought to replace. Like many other businesses during and after these wars, publishing did not expand in response to internal demand; it adapted to external events.

Apart from a few exceptional cases, the first major step forward in publishing was the formation of companies whose capital was largely owned by foreign interests, or the establishment of such companies as veritable enclaves, which were a force for the expansion of the publishing trade and exercised a powerful, if not decisive, influence on the market. In this field, as in so many others, the deep-rooted practice of uncritically embracing every new idea from abroad frequently led to the acceptance of such schemes without any thought as to how far they met the requirements of the real situation.

Another point, by no means unrelated to the preceding one, is the fact that most of the publishing houses began as craft enterprises. They never became large companies in the economic sense of the term, or, if they did so, they very soon became associated with foreign interests. Some of them simply sold out to these interests; in such cases, the adoption of foreign patterns was almost inevitable.

These explanations in no way imply any disparagement of the importance and usefulness of the activities of many of the Spanish publishing houses that set up in business in the region or any detraction from the merits of the intellectuals who so often worked as literary advisers, translators and so on.

However, publishing developed in other directions as well. It is only right to point out, merely by way of example, various other activities which are a tribute to the abilities and inventiveness of the Latin American peoples. One such case is the Fondo de Cultura in Mexico, which showed that it was possible to carry through an idealistic cultural project. The Fondo de Cultura began, admittedly, by producing numerous translations of works on economics, a subject on which very little had been published in Spanish. However, its catalogue was gradually enlarged by the addition of new collections. Amongst other important achievements, it has increased the number of Spanish-speaking authors and it has broadened the range of disciplines covered. Such an approach to publishing betokens confidence and faith in the future of the New World.

Nonetheless, the prevalence of commercial criteria and of the managerial structures already discussed, together with other factors, considerably impeded the establishment of a genuinely Latin American publishing industry. The development of individual interests, the acceptance of foreign patterns and the continued application, through sheer apathy, of criteria that were in many cases detrimental determined the situation in the publishing trade. Other factors in the creation of this situation were the lack of modern printing facilities and a shortage of production personnel - technicians and artists working in book production - together with the adverse implications of this shortage for the development of a vigorous, independent book industry. The last and principal factor, however, was the lack of a Latin American and national publishing policy.

The above points are not serious in themselves, but they are indicative of weaknesses which are to be found throughout the whole Latin American business sector and which offer further proof, if proof were needed, of the lack of national cultural policies which would provide a well-defined framework for a book policy(1).

3.1 Publishing output

One of the indicators most commonly used for evaluating the standard of cultural development of a country or region is its book production, considered from a variety of angles.

According to the statistics published by Unesco (Table 16), 591,000 titles were published in 1976, and approximately 70 per cent of them were brought out in developed countries. The imbalance between book production in developed countries and in developing countries is no less marked today. Although the number of books produced by developing countries increased more or less regularly after 1955, when they produced 22 per cent of the published works in the world, this figure has reached only 30 per cent over a period of twenty years. By contrast, the population of these countries now represents 68 per cent of the total world population.

If we compare the number of titles per million inhabitants, we find a similar situation. There has been a gradual advance in most regions in this respect, but here, too, there is a marked difference between the ratio recorded in developed countries and that found in the rest of the world. In 1976, 565 titles per million inhabitants were published in Europe, as against 92 in Latin America, 27 in Africa and 70 in Asia, which has a population equal to 45.2 per cent of the total world population, whereas the population of Europe is 15 per cent of the world population.

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(1) SCHIRO, Heriberto, Políticas Oficiales para el Fomento de la Producción Editorial, Tercer curso Latinoamericano de Producción y Distribución de Libros, CERLAL, Conference No. 12 Lima, Peru, October 1973.

The percentage of production by regions was 1.9 per cent in Africa, which showed a slight increase, and 45.6 per cent in Europe, where it dropped slightly from the 49.1 per cent recorded in 1960.

Compared with world book production, Latin American output is not large. Although it has not decreased, it accounted for only 5.2 per cent of the titles published in 1976. However, Table 16 shows that the number of titles published in 1960 (17,000) had increased fifteen years later, on a proportionately similar scale to the trend recorded in world production. The increase was more marked over the last six years of the period under review.

This increase in the number of titles published still fell short of the requirements of the region, where there is a marked demand for greater expansion. Such a level of demand reflects the gradual increase in demographic ratios and the upsurge in school enrolments. Moreover, on the basis of the figures given in Table 17, which contains a partial estimate of Latin American book production by countries, it is possible to discern the fluctuations that have taken place and to draw a number of conclusions:

1. Over the past five years, according to the above indicators, the publishing industry in the region has not expanded production sufficiently to keep up with the actual and potential size of the market, in which there is a steady demand in quantitative terms.

2. The increase which occurred in previous periods in two important countries - Brazil and Mexico - as shown by increased paper consumption has not continued at the same pace. Brazil, for example, which produced an average of 4,972 titles over the 1963-1966 period, doubled this figure and trebled its paper consumption over the following five years. During the next five years, expansion continued, but the rate of expansion was lower, and recent estimates indicate that the greater increases that were expected did not materialize. The same thing happened in Mexico, although more reliable data would possibly show that progress was made, as a result of the re-equipment and modernization of printing plant (which has also occurred in Brazil).

3. Argentina, the other major Latin American book producer, is regaining its traditional level of production. However, despite the increases in production shown in Table 17, it is too early to say what the situation is in the period in question. According to data collected since 1976, the production level achieved in that year has not been reached. Although a slight cyclical swing is to be expected, there can be no sustained development in the publishing industry until a clearly defined book policy is formulated which does not leave the industry dependent on the vagaries of general economic policies.

4. Of the other producers in the region, Colombia showed a steady increase, which brought it into fourth place in the table of book producers. The number of titles published in Colombia has risen at an average annual rate of around 20 per cent from 848 in 1974 to just under 2,000 in 1978, if recent unofficial figures prove to be correct. The opposite has occurred in Peru and Chile, where publishing output has been declining for a number of years.

5. Cuba and Uruguay are in a similar situation to Peru and Chile. Bolivia achieved a modest yet promising increase in 1974-1975.

TABLE 16

WORLD AND REGIONAL ESTIMATE OF BOOK PRODUCTION.

	Year	World	Africa	North America	Latin America	Asia	Europe	Oceania	USSR
Number of titles produced	1960	332.000	5.000	18.000	17.000	51.000	163.000	2.000	76.000
	1965	426.000	7.000	58.000	19.000	61.000	200.000	5.000	76.000
	1970	521.000	8.000	83.000	22.000	75.000	247.000	7.000	79.000
	1975	568.000	11.000	92.000	29.000	88.000	264.000	5.000	79.000
	1976	591.000	11.000	91.000	31.000	100.000	269.000	5.000	84.000
Number of titles per million inhabitants	1960	144	19	91	79	53	383	121	355
	1965	168	23	271	77	57	450	286	329
	1970	187	23	367	78	62	535	361	329
	1975	185	27	389	89	65	558	235	310
	1976	186	27	212	92	70	565	227	326
Percentage of production by areas	1960	100%	1,5	5,4	5,1	15,4	49,1	0,6	22,9
	1965	100%	1,6	13,6	4,5	14,3	46,9	1,2	17,8
	1970	100%	1,5	15,9	4,2	14,4	47,4	1,3	15,2
	1975	100%	1,9	16,2	5,1	15,5	46,5	0,9	13,9
	1976	100%	1,9	15,4	5,2	16,9	45,6	0,8	14,2
Percentage distribution of population	1960	100%	11,8	8,6	9,3	41,9	18,4	0,7	9,3
	1965	100%	12,2	8,4	9,8	42,2	17,6	0,7	9,1
	1970	100%	12,6	8,1	10,2	43,2	16,5	0,7	8,7
	1975	100%	13,1	7,7	10,6	44,2	15,4	0,7	8,3
	1976	100%	13,0	7,5	10,5	45,2	15,0	0,7	8,1

Source: Statistical Yearbook - 1977 - Unesco, Paris, 1978.

TABLE 17

ESTIMATE OF LATIN AMERICAN BOOK PRODUCTION, BY COUNTRY - COMPARISONS

COUNTRY	NUMBER OF TITLES					NUMBER OF TRANSLATIONS
	TOTALS			CHILDREN'S BOOKS	TEXTBOOKS	
	1974	1975	1976			
ARGENTINA	4.795	5.141	6.674	367(1976)	360(1976)	1361(1976)
BOLIVIA	248	339		5(1974)	11(1974)	
BRAZIL	9.948	12.296		506(1975)	1597(1975)	1684(1973)
COLOMBIA	848	1.272	1.320 e	16(1975)	158(1975)	15(1973)
COSTA RICA	180	186	60			
CUBA	869	851	726	54(1976)		15(1975)
CHILE	796	628	529		90(1976)	24(1973)
ECUADOR	31					1(1973)
EL SALVADOR		14				
GUATEMALA	84					6(1971)
HAITI						
HONDURAS	26					
MEXICO	5.733	5.882	4.851	351(1976)	213(1971)	218(1973)
NICARAGUA						
PANAMA	171	226	106	2(1975)		
PARAGUAY						
PERU	1.322	1.090	925	3(1976)	32(1976)	32(1973)
DOMINICAN REPUBLIC	32	20	48			
URUGUAY	601	481		7(1975)	42(1976)	
VENEZUELA		480 e				77(1971)
BARBADOS	113	87	199			
GUYANA			33	1(1976)	3(1976)	1(1976)
JAMAICA			1			
TRINIDAD AND TOBAGO		7	18	4(1975)		

COMPARISON WITH OTHER PRODUCER COUNTRIES

FED. REP. OF GERMANY	48.034	40.616	44.477	2056(1976)	1863(1976)	6458(1973)
SPAIN	24.085	23.527	24.584	825(1976)	3476(1976)	4489(1973)
USA	81.023	85.287	84.542	2210(1976)		1968(1973)
FRANCE	26.247	28.425	29.371	604(1974)	568(1974)	1934(1973)
UNITED KINGDOM	32.133	35.526	34.340	2269(1976)	1260(1976)	682(1973)
USSR		78.697	84.304	1783(1976)	2283(1976)	4402(1973)

Source: Statistical Yearbook 1977 - Unesco, Paris, 1978

e: estimated

6. Production in the other countries of the region is mostly insignificant. However, the Venezuelan publishing industry, for which only estimated figures for 1975 are available, despite its fairly low output, has developed sufficiently for it to be ranked in the second group of countries in the table of Latin American book producers.

7. Regional production continues to be concentrated among a few countries (Brazil, Argentina and Mexico) which, with slight annual variations, jointly account for around 70 per cent of the total output.

8. We have said that world and regional book production increased at a similar rate between 1960 and 1976, with a rise of just under 80 per cent in world book production and slightly over 80 per cent in regional book production. However, no one comparing the two increases in the sixties can fail to note that, in that decade, world production rose by 57 per cent, while regional production went up by only 29 per cent. These figures indicate that, in recent years, Latin American production was far higher than world production as a whole, which was not so in the previous decade.

9. The reader will be struck by the fact that the statistics show little or no production of textbooks and inadequate production of children's books, whereas we know that in developed areas of the world, particularly over the past few years, titles devoted to education in general and to children's education in particular have made up a very high proportion of the total number of published titles.

10. It is most important to note the serious shortage of regional statistics. There are considerable gaps in the few available statistics, particularly in regard to the size of an edition (see table 18), and the statistics are sometimes fragmentary, as in the case of the number of translations used in each country. In general, the categories of available data, like those of the tables in this study, are not identical in every respect. For example, the category "titles" includes books and pamphlets in some cases (Brazil, Colombia, Peru and Barbados) and only first editions in others (Chile).

It would obviously be risky or premature in many respects to draw definite conclusions from the data provided. Most of the information is incomplete or inaccurate, provisional and, depending on the sources, even inconsistent. Nevertheless, it may perhaps be argued that the major problem in Latin America resides not so much in low production as in the inefficient distribution and circulation of books. Excessive emphasis on increasing the number of titles should therefore be avoided; the aim should be, rather, to print much larger editions of each title. While we do not discount the need for sustained growth in book production, policies regarding access to books, stock turnover, handling, availability, legal formalities, functionality and book reading habits should be strengthened and ratified, as we shall see.

Table 18

:LATIN AMERICA: PRODUCTION BY SUBJECTS(1) NUMBER OF TITLES - 1975-1976 DATA

Country	Total	General	Philosophy	Religion	Social Sciences	Pure Sciences	Applied Sciences	Fine Arts	Literature	Geography & History
ARGENTINA	6.674	2.324	651	→	1.041	178	443	496	1.400	141
BOLIVIA	339	15	3	13	88	14	37	4	108	57
BRAZIL	12.296	1.212	409	1.021	3.055	1.330	1.060	598	2.902	709
DOMINICA	48	4	-	1	12	1	8	1	15	6
CHILE	529	5	20	71	134	24	61	25	161	28
COLOMBIA	1.272	34	18	80	515	65	108	46	276	130
COSTA RICA	186	2	3	1	78	2	63	2	27	8
CUBA	726	38	11	-	256	28	99	8	245	41
ECUADOR	31	1	-	-	9	-	-	1	18	2
EL SALVADOR	14	-	-	-	4	-	1	-	8	1
GUATEMALA	84	7	3	5	34	7	5	7	10	6
HONDURAS	30	-	-	3	17	-	2	1	6	1
MEXICO	4.851	43	85	35	498	297	2.882	166	583	262
PANAMA	106	2	3	-	29	17	7	3	35	10
PERU	925	14	20	22	378	28	104	43	234	82
URUGUAY	481	99	12	14	102	19	61	23	77	74
TOTAL	28.592	3.800	1.238	1.266	6.250	2.010	4.941	1.424	6.105	1.558
PERCENTAGE	100%	13.3%	4.3%	4.5%	22%	7%	17.2%	5%	21.3%	5.4%

CHAPTER IV - PRODUCTION

1.1 The printing industry

Publishing is an industrial activity which is carried out in three stages - intellectual work, printing and marketing. The first stage is covered in Chapter I. The second embraces the material aspects of production. This stage, in which the book is treated as an industrial product, is the subject of the present chapter.

We shall begin by examining the printing industry, to which the works selected by the publisher are sent.

The book printing industry can hardly be discussed outside the context of the printing industry in general, for, with a handful of exceptions, few presses in the region are engaged exclusively in book production. Therefore, practically all the available statistics refer to the printing industry as a whole and do not reflect the trends and prospects of the publishing industry in particular. However, for the purposes of certain estimates, it is usually considered that the publishing industry accounts for around 20 per cent of overall printing output.

An initial analysis would suggest that, like the publishing industry, the printing industry in the region is characterized by dissimilar stages of development, even within a single country, and by marked differences in the nature of its activities.

The Technical Assistance Committee of the Latin American Confederation of the Graphical Industry has made the following summary of the common problems confronting the industry in the region. These problems are not listed in order of priority; they are interrelated, and they all slow down development in this sector:

1. The need for training at all levels of the business (for workers, supervisors and directors).

2. State interference through the various official bodies which intrude upon the market supplied by the printing industry.

3. A tendency towards excessive state control of the economy, which exacerbates the above-mentioned problem and discourages investment. Its effect is to slow down the development of industry in general and the printing industry in particular.

4. A lack of statistical information on the sector, which makes it difficult to undertake the kind of planning needed to ensure the effective development of the industry in the future.

5. The poor quality of the raw materials (paper, pasteboard, cardboard, inks, etc.) which makes it difficult to use plant that produces large quantities.

6. The lack of proper information on the technology (plant or processes) available in the countries of the region, which could be exchanged on a commercial basis by firms whose financial situation is comparable.

7. The lack of an efficient, up-to-date system for measuring productivity which could be used by all the countries of the region. Such a system would be a means of measuring operating efficiency, on the basis of which studies on complementary activities could be undertaken by industries which operate in different countries but which have the same levels of efficiency.

The Latin American Congress of the Graphical Industry and Allied Industries (CONLATINGRAF),(1) meeting in Lima in November 1977, addressed itself to the problems of the region and reached a number of conclusions. We have singled out those which best reflect the situation in the sector. When the statistics on the industry had been processed it was clear that there was an overriding need for national and international data according to which strategies and tactics could be worked out, both for each country and for the whole continent. The present situation is epitomized by the paradoxical fact that, while idle capacity stands at 40 per cent, 200 million dollars' worth of print a year enters Latin America, mostly in the form of books and magazines. "This is our market", said the participants, "but we shall never succeed in supplying it unless we have information on the basis of which we can organize our activities".

At this meeting, the President of the Latin American Confederation of the Graphical Industry and Allied Industries presented a study of the state of the Latin American printing industry, in which he made a number of points, including the following:

1. The economic importance of the printing industry in relation to the gross value of a country's manufacturing output is inversely proportionate to the country's level of industrialization. The printing industry contributes 1.34 per cent and 1.5 per cent of the industrial output in Mexico and Argentina respectively; for Chile and Uruguay the corresponding figures are 2.30 per cent and 2.61 per cent.

2. However, if the importance of the printing industry is considered in relation to the economy as a whole, there is less variation between countries. How similar the degrees of participation are may be seen from the following figures: Colombia and Peru (0.5 per cent-0.6 per cent), Argentina and Uruguay (0.7 per cent-0.8 per cent), Chile and Brazil (1 per cent). Mexico did not provide any information.

3. Generally speaking, growth in the printing industry between 1963 and 1973 kept pace with the growth recorded in the economy as a whole. In Peru, growth in the printing industry would seem to have outpaced overall economic growth, while the rate of growth in the Chilean printing industry (20.9 per cent a year) seems inordinately high.

4. In practically all the countries, with the sole exception of Uruguay, the value added is higher in the printing industry than in manufacturing industry as a whole. This difference is more marked in Chile, followed by Peru, Colombia and Mexico. Inversely, the input ratio is lower than the average for a manufacturing industry.

5. The proportion of raw materials in total production is between 0.3 per cent and 0.4 per cent in most countries, and 0.5 per cent in Mexico. Although these figures show a fair degree of similarity, comparison of raw materials with the value of graphical inputs produces a completely different picture. In Uruguay and Argentina, they represent around half the inputs. In the other countries, the proportion is close to 90 per cent. This disparity is explained by the difference in costs of other items of expenditure such as freight, communications, fuel, electricity, personal services and so on in each case.

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(1) LATINGRAFICA, organ of the Latin American Confederation of the Graphical Industry, No. 4, 1977, p. 72.

6. Most of the countries state that the gross trading surplus represents between 50 and 60 per cent of the revenue in the printing industry. In Chile and Brazil, this figure is over 70 per cent, while it is as high as 85 per cent in Uruguay.(1)

The study from which we have taken these facts suggests that the printing industry in the region, and in several countries in particular, has come to play a by no means negligible role in the economic development of the different countries. However, it has so far failed to gain the necessary hold on the Latin American market. A variety of factors account for this. Apart from the problems outlined above, the situation has been affected by the distinctive features of the printing industry in most of the countries of the region.

The extraordinary complexity of the problems confronting printing firms today calls for action commensurate with the magnitude of these problems. Printing has ceased to be a matter for craftsmen. It has become an industry on which technology has made as great an impact as on any other industrial activity.

We are not advocating measures such as mergers or the establishment of large companies, although such measures might well prove effective in other industries like the iron and steel industry and the petrochemical industry. Experience in highly developed countries has shown that printing will continue to be a small or medium-sized industry. Furthermore, in some cases the creation of gigantic printing corporations has had a patently adverse effect.(2)

2.1 Printing technology. Plant and equipment

The process of transforming raw material into a product - a book - is made up of a series of stages, each consisting of a specialized activity. As a result of the technical advances achieved in these phases of production, together with the high cost of equipment, the traditional printing works, which used to undertake composition, printing and bookbinding - the whole industrial process of book production - has been replaced by a number of firms specializing in the different stages of the process.

This is not the place to study in detail the structure of the different components of this process in the modern printing industry. The three main components - composition, printing and bookbinding - have altered radically, and it is essential to incorporate the latest technological advances into all three with a view to adapting them to the requirements of a potentially expanding market.

In point of fact, the acceptance of the need to produce well-designed books for the mass market and the acknowledgement of the important role now played by colour in the design of tasteful, attractive products make it necessary to consider the technological requirements involved, beginning with an evaluation of printing plant and equipment.

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(1) COLOMBO, Juan Manuel, Diagnóstico Sectorial de la Industria Gráfica Latinoamericana, Lima 1977.

(2) LANDOLFI, Héctor, La Problemática de la Industria Gráfica Argentina, offprint from the journal "Argentina Gráfica", No. 237/240, Buenos Aires, 1971.

Obviously, the efficient production of editions to such a high standard necessitates detailed information on the basis of which rational decisions can be taken. In the first place, equipment must be classified in terms of printing processes (lithography, offset printing, photogravure) and the different possibilities within these processes (rotary or non-rotary presses). Secondly, it is important to establist how much of the equipment is suitable for printing two or more colours at the same time. The third point, closely related to cost considerations, is the need to determine what staff is required for the composition systems installed to supply the presses. Lastly, a larger, rationally produced output will be dependent on machine-hour availability. This aspect of the question will entail evaluation of the need for investment in this sector.

No less important than the previous points is the matter of bookbinding equipment. The mass marketing of books generally gives rise to a need for special bookbinding processes suited to "cut-flush" books instead of the traditional sewn binding. This means that special attention has to be paid to the choice of glues. All these points must be covered in a study of resources.

Owing to the specialized nature of the processes involved, the preparation of films for colour printing has become a separate branch of the complex printing industry. Photogravurists supply printing establishments with the films to be used in the subsequent printing process. A survey of the "colour gravure business", as it is also known, is essential to a thorough appraisal of the printing business.

The study of the available resources in the region should also include a survey of the means of supplying bookbinding materials (cardboard, cloth, glues, etc.).

The development of an integrated publishing industry in Latin America or the less ambitious alternative of engaging in co-publishing projects, for example, depends on information on the availability and costs of services. Such information can be obtained at the time of conducting a survey of the printing and bookbinding business, along the lines suggested above.

Brazil is now enjoying the benefits of a policy of exempting imported printing machinery and equipment from surcharges and taxes and classifying printing firms among the "bases for national development" with regard to the "increase in the competitiveness of the firm". Brazil has led the other countries of the region in its degree of involvement in the LAFTA market, and has earned very considerable revenues through its printing services over the past fifteen years.

3.1 Training

For some years, there have been frequent discussions on the urgent need to train the specialized personnel required for building up the publishing industry. This point was raised at the meeting of experts held in Bogotá in 1969, when it was put forward as one of the objectives of the regional body then being set up. CERLAL has discussed the need for such training on a number of occasions.

As we have already seen, the publishing industry avails itself of a range of services provided by authors and - in some cases - translators, the local or foreign paper industry, printing and bookbinding services and so on. However, publishing itself involves skilled collaboration on the part of a small band of professionals. Without considering in detail the forms of collaboration involved in each stage of production, and without claiming that the list of publishing personnel is exhaustive, it is possible to list the following categories of personnel: (a) proof-readers and editors; (b) model makers, illustrators, draughtsmen, mounters, photographers and retouchers; and (c) graphical workers, artists and advertising personnel.

No survey has been made of these personnel, who are essential to book publishing, in the different countries of the region. The fact is noted and mentioned with a view to making people aware of the need for a proper evaluation of these resources.

As regards training in general, CONLATINGRAF has provided member countries with a training system designed to meet operational needs (with input, output and feedback possibilities).

Any printing establishment can set up this system, with the functions described for each group, and can plan and develop training schemes for workers, supervisors and managers.

Under the proposed system, a school for printing could be planned and a course on costing could be worked out.

With a view to facilitating the training of skilled workers, associations in the countries of the region have exchanged information on the running of schools and courses which have been successful in the majority of cases.

The development of the printing industry increasingly needs specific action to promote technological expansion, complemented by the work of research institutes which will determine the requirements of the industry and train the technicians needed.

4.1 Raw materials. Paper

Paper is of course the main input in book production. It has even been maintained that no publishing industry can exist without a highly developed basic paper industry. If a country has no paper industry of its own, its development is dependent on the importation of basic inputs, and its publishing output is subject to contingencies unconnected with the publishing industry. Moreover, the increasing scarcity and cost of paper and cellulose on the international markets also has an effect on costs in the book industry.

Generally speaking, paper accounts for at least half the cost of a book. The price of paper is constantly rising on the international markets, and suppliers size up the market, imposing their own conditions or restricting supply.

Paper is an input which is in a critical situation almost everywhere in the world today. Therefore it does not seem possible that the mere lifting of import duties on paper could lead to an adequate supply for those countries with a developed publishing industry but poor paper production in terms of quantity, quality and variety.

Some countries of the region, particularly Brazil and Mexico, are making considerable headway towards self-sufficiency in paper.

Since paper is the most important component in the printing process and one of the factors which has given Latin American publishers and printers the greatest cause for concern, ABIGRAF (the Brazilian Association of the Printing Industry) undertook research with a view to establishing paper supply trends in Latin America up to 1980. Its findings are presented in the following tables.

Table 19

PLANT CAPACITY FOR THE PRODUCTION OF PAPER AND CARDBOARD

1976-1980

País		1976	1977	1978	1979	1980
ARGENTINA 1)		920	970	1.085	1.175	1.240
	% Increase	-	5,4	11,9	8,3	5,5
BRAZIL 1)		2.584	2.838	3.196	3.514	3.905
	% Increase	-	9,8	12,6	9,9	11,1
COLOMBIA 1)		365	371	394	411	435
	% Increase	-	1,6	6,2	4,3	5,8
CHILE 1)		336	351	368	458	584
	% Increase	-	4,5	4,8	24,5	27,5
ECUADOR 2)		25	46	52	55	55
	% Increase	-	84,0	13,0	5,8	-
MEXICO 1)		1.634	1.745	1.807	1.930	2.124
	% Increase	-	6,8	3,6	6,8	10,0
PANAMA 2)		28	29	30	31	32
	% Increase	-	3,6	3,4	3,3	3,2
PERU 2)		210	210	355	380	380
	% Increase	-	-	-	-	43,2
VENEZUELA 2)		662	715	741	741	741
	% Increase	-	8,0	3,6	-	-

Unit: Metric tons.

Sources: (1) Information supplied by CICEPLA Members
(2) "A study of pulp and paper capacity, 1975-1980". Food and Agriculture Organization of the United Nations. Rome. Italy. 1976.

Table 20

PLANT CAPACITY FOR THE PRODUCTION OF WRITING PAPER AND PRINTING PAPER
1976-1980

Country		1976	1977	1978	1979	1980
ARGENTINA:	Newsprint	-	-	50	90	105
	Other paper	185	195	210	230	245
	Total	185	195	260	320	350
BRAZIL:	Newsprint	127	127	127	142	253
	Other paper	527	595	614	624	624
	Total	654	722	741	766	877
COLOMBIA:	Newsprint	-	-	-	-	-
	Other paper	70	77	84	93	101
	Total	70	77	84	93	101
CHILE:	Newsprint	140	140	146	152	272
	Other paper	65	80	97	129	133
	Total	205	220	253	281	405
MEXICO:	Newsprint	60	85	125	225	300
	Other paper	365	400	405	405	447
	Total	425	485	530	630	747

Unit: Thousands of metric tons
Source: Data supplied by CICEPLA Members.

Table 21

PRODUCTION, IMPORTS, EXPORTS AND APPARENT CONSUMPTION OF PAPER AND CARDBOARD, 1971-1976

In thousands of tons

Country		1971	1972	1973	1974	1975	1976
ARGENTINA 1) 2)	Production	717	747	775	827	785	-
	Imports	251	221	221	233	177	-
	Exports	5	9	28	59	2	-
	Apparent consumption	963	961	968	1.001	960	-
BOLIVIA 5)	Imports and Apparent consumption	13	14	18	13	-	-
BRAZIL 1)	Production	1.237	1.345	1.587	1.854	1.688	1.983
	Imports	214	264	346	466	203	269
	Exports	4	10	43	43	13	40
	Apparent consumption	1.447	1.599	1.890	2.277	1.878	2.212
COLOMBIA 1)	Production	235	250	286	305	251	284
	Imports	92	83	94	102	90	78
	Exports	3	4	4	4	3	27
	Apparent consumption	324	329	376	403	308	335
COSTA RICA 4)	Production	5	6	6	6	6	
	Imports	108	115	115	129	-	
	Exports	-	-	3	3	-	
	Apparent consumption	114	121	117	132	-	
CHILE 1)	Production	262	254	259	262	253	288
	Imports	21	20	27	13	14	13
	Exports	79	42	53	95	93	121
	Apparent consumption	204	232	233	180	194	180
ECUADOR 2)	Production	9	12	14	15	18	17
	Imports	141	160	142	163	170	159
	Exports	-	-	-	-	-	-
	Apparent consumption	150	172	156	178	188	176
EL SALVADOR 4)	Production	3	5	5	14	-	-
	Imports	37	43	43	42	-	-
	Apparent consumption	40	48	48	55	-	-
GUATEMALA 4)	Production	16	23	19	28	25	-
	Imports	40	66	29	59	-	-
	Exports	7	8	12	11	-	-
	Apparent consumption	49	81	36	76	-	-
GUYANA 4)	Imports	9	10	7	5	-	-
	Apparent consumption	9	10	7	5	-	-
HONDURAS 4)	Imports	106	92	92	93	-	-
	Apparent consumption	106	92	92	93	-	-
JAMAICA 4)	Production	-	-	-	10	-	-
	Imports	52	59	59	55	-	-
	Apparent consumption	52	59	59	65	-	-
MEXICO 1)	Production	908	981	1.112	1.254	1.185	1.331
	Imports	195	221	214	292	302	295
	Exports	-	-	-	-	-	-
	Apparent consumption	1.103	1.202	1.326	1.546	1.487	1.626

Country		1971	1972	1973	1974	1975	1976
NICARAGUA 4)	Imports and Apparent consumption	11	11	11	29	-	-
PANAMA 4)	Production	15	15	15	12	-	-
	Imports	82	80	64	64	-	-
	Exports	3	2	2	2	-	-
	Apparent consumption	94	93	77	74	-	-
PARAGUAY	Imports						
	Apparent consumption	-	8	9	9	7	-
PERU 2)	Production	142	155	148	165	142	153
	Imports	78	73	63	96	61	53
	Exports	14	22	12	10	5	13
	Apparent consumption	206	206	199	252	198	194
TRINIDAD and TOBAGO 4)	Imports	39	36	29	45	-	-
	Apparent consumption	39	36	29	45	-	-
URUGUAY 6)	Production	47	41	52	62	-	-
	Imports	35	23	25	26	-	-
	Apparent consumption	72	64	77	88	-	-
VENEZUELA 3)	Production	266	290	334	342	384	-
	Imports	-	-	-	-	-	-
	Exports	-	-	-	-	-	-
	Apparent consumption	388	419	474	527	533	-

Sources:

(1) Data supplied by CICEPLA Members (Argentina: 1975 only; Mexico: revised figures).

(2) Statistical Report of the Third Meeting of the Paper and Cellulose Study Group of the ECLA/FAO Industrial Development Commission. Pulp and Paper International Review. Vol. 17. No. 8, 1975.

(3) Directorio Industrial del Sector Gráfico y Papelero de Venezuela 1976.

(4) FAO Yearbook of Forest Products Statistics 1963-1974.

(5) Bolivian Trade Yearbook. Instituto Nacional de Estadísticas. Bolivia.

(6) Pulp and Paper International Annual Review.

Table 22

PRODUCTION, IMPORTS, EXPORTS AND APPARENT CONSUMPTION OF WRITING PAPER AND PRINTING PAPER
1971-1976

Country		1971	1972	1973	1974	1975	1976
ARGENTINA:	Production	131	122	150	176	143	-
	Imports	17	25	20	16	12	-
	Exports	4	7	1	22	2	-
	Apparent consumption	144	140	159	170	310	153
BRAZIL:	Production	422	470	497	553	417	577
	Imports	197	238	251	341	89	239
	Exports	3	8	25	17	6	33
	Apparent consumption	616	700	723	877	500	783
COLOMBIA:	Production	49	49	53	62	44	59
	Imports	65	71	77	73	69	72
	Exports	2	4	4	4	3	4
	Apparent consumption	112	116	126	131	110	127
CHILE:	Production	151	130	137	168	153	188
	Imports	4	7	8	3	3	6
	Exports	79	42	53	92	92	120
	Apparent consumption	76	95	92	79	64	74
MEXICO	Production	219	244	258	297	286	353
	Imports	180	184	167	234	263	249
	Exports	-	-	-	-	-	-
	Apparent consumption	399	428	425	531	549	602

Unit: Thousands of metric tons
Source: Data supplied by CICEPLA Members

Account was taken of statements made by the Director of the FAO Reforestation Department, who said that the organization had carried out studies of the possible demand for cellulose and paper in 1990, relating population growth and increases in national income and consumption. The studies showed that, despite the economic recession, which is slowing down the rate of increase in the national income in various countries, and the resulting decline in the use of paper, the capacity of existing and planned mills will be insufficient to meet the demand in 1990. Table 19 shows estimated plant capacity for paper and cardboard production in Latin America up to 1980. Table 20 refers only to writing paper and printing paper.

Table 21 gives an overall view of production, imports, exports and apparent consumption of paper and cardboard in the region for the period 1971-1976. Table 22 covers the same period and items, giving figures relating only to writing paper and printing paper for the main paper-consuming countries. All these charts are based on the study carried out by ABIGRAF.

While there is an upward trend in the consumption of printing paper in Latin America, production falls short of local demand. As has been stated, this situation is likely to continue, in view of the existing shortage of newsprint, and projects in progress are primarily geared to meeting this demand. This means that those needing supplies of this important raw material for book printing resort to an international market where demand is high and supply problems have still not been completely resolved; and they will be obliged to do so in the future. Proposals for solving these problems usually concern the achievement of self-sufficiency, which will make it possible to overcome the problem of conditions imposed from abroad and domestic interests that are not conducive to a balanced development of the sector or are not compatible with the interests of the nation.

As has already been noted, few countries of the region have a substantial volume of production. Book publishers have to meet requirements that often do not fit in with the production programmes of local paper industries. The obstacles encountered arise from a variety of factors, which may be summed up in three key points: price levels, quality range and supply opportunity.

As a large part of book production is intended for export, it is important to obtain supplies of paper at prices compatible with the international market. The level of the international market sets a standard for the selling prices of competitors. It frequently happens that the protection which local paper industries enjoy for development purposes serves to put up the level of international prices, owing to the imposition of import duties and surcharges. The efforts which publishers have made to secure reasonable treatment in this respect have, on the whole, met with very little success. In Mexico, which is the exception, legislation aimed at the development of the publishing industry gives publishers up to 100 per cent exemption from duty and other charges on paper imports in special circumstances. However, in the other countries which apply a system of surcharges designed to protect the local industry, the situation is still unfavourable from the point of view of the publishing industry. In certain countries, such as Argentina, books are imported without surcharge, whereas paper is subject to import duty and other charges, even when it is intended for book production.

As regards the second question, it should be noted that the term "printing paper" embraces a very wide range of types, weights and qualities of paper and includes special kinds of paper and Bristol board. Format is also an important consideration in dealing with paper. The point of conflict between the two industries lies in the paper manufacturers' refusal to accept the broad range of types, weights and qualities of paper required by the publishing industry in order to produce attractive books for a highly competitive market. The overall view taken by the paper manufacturer makes no allowance for the distinctive features and volume of paper consumption for publishing compared with the bulk of his output. He solves the problem simply by producing more uniform types and formats and regards the publisher's requirements as unnecessary.

Lastly, something should be said on the question of supply opportunity. It is unlikely that the time-scales of the two sectors - producers and consumers of printing paper - coincide with the cycles of production and consumption. The very fact that the production of the type of paper used in book production accounts for the smallest proportion of overall paper production means that the producer will allocate a specific period to meeting the annual demand for such paper, which he will seek to deliver to the users immediately. The latter are not in a position to store their whole year's stocks for any great length of time. This failure to match production and consumption time-scales gives rise to differences that are not always understood.

The interests of both sectors have to be reconciled so as to strengthen local paper industries without neglecting the legitimate requirements of the publishing industry.

The countries of the region which belong to LAFTA are able to co-operate, in conditions that are more advantageous than in the case of supplies coming from countries outside the LAFTA system. However, the volume of production of printing paper falls short of the demand from publishers within this regional system.

The percentages for the consumption of printing paper and writing paper are also indicators of the development and scale of publishing activities. However, it should be realized that this is not a satisfactory way of measuring book production, not only because exactitude is impossible in regard to this type of consumption but also because the information supplied is often biased and is not objective enough for a comparative survey of the sector to be made. We have used the data contained in the Unesco Statistical Yearbook, although we do not detract from the validity of the statistics used in previous sections, which were compiled for different purposes.

Table 23 shows the predominance acquired by Brazil in the region in the matter of paper consumption, measured both in metric tons and by numbers of inhabitants. In absolute terms, its paper consumption more than quadrupled in the last decade, and increased threefold in relative terms.

The same thing happened in Mexico, although on a somewhat smaller scale. Over the same period, this country's consumption in tons trebled, while the per capita increase was little more than twofold.

In neither case was the level of consumption indicated above proportionately reflected in book production, a fact which is in line with our earlier observations. This could indicate the relativity of these comparisons.

It is also interesting to note the increase recorded under this heading in Chile, Colombia, Cuba, Venezuela and several Caribbean and Central American countries.

None the less, it is impossible to disregard the persistent decline and stagnation observed in Argentina and Uruguay, which do not fully correspond with recorded trends in book production.

Table 23

CONSUMPTION OF PRINTING PAPER AND WRITING PAPER IN LATIN AMERICA

	1965		1970		1975		1976	
	A	B	A	B	A	B	A	B
ARGENTINA	111,0	5,0	122,7	5,16	98,7	3,89	98,7	3,84
BOLIVIA	1,7	0,4	3,9	0,82	3,9	0,72	3,9	0,70
BRAZIL	154,6	1,87	266,3	2,80	552,1	5,03	642,8	5,69
COLOMBIA	22,0	1,18	42,9	1,94	52,3	2,02	66,3	2,48
COSTA RICA	3,1	2,07	4,0	2,30	2,8	1,40	2,8	1,37
CUBA	22,5	2,88	26,5	3,09	42,8	4,51	42,8	4,42
CHILE	23,2	2,73	36,1	3,85	39,2	3,82	46,2	4,42
ECUADOR	0,3	0,06	5,9	0,98	10,3	1,45	11,3	1,54
EL SALVADOR	2,2	0,74	2,1	0,60	6,0	1,46	6,0	1,41
GUATEMALA	5,6	1,22	3,7	0,70	6,2	1,01	12,2	1,93
HAITI	0,1	0,02	0,3	0,07	0,3	0,07	0,3	0,06
HONDURAS	1,1	0,50	2,5	0,98	2,6	0,86	2,8	0,83
MEXICO	122,9	2,87	359,0	7,13	320,0	5,40	361,0	5,90
NICARAGUA	1,5	0,88	2,5	1,27	1,8	0,78	1,8	0,75
PANAMA	2,3	1,82	4,4	3,02	1,1	0,66	4,1	2,38
PARAGUAY	0,4	0,20	0,5	0,22	1,4	0,53	1,4	0,51
PERU	14,1	1,23	22,0	1,66	34,2	2,23	34,1	2,16
DOMINICAN REPUBLIC	0,8	0,22	3,6	0,83	5,9	1,15	5,9	1,12
URUGUAY	12,6	4,50	14,6	4,94	10,6	3,41	11,6	3,70
VENEZUELA	27,7	3,04	35,0	3,32	56,0	4,59	56,0	4,45
BARBADOS	0,1	0,43	0,5	2,09	0,8	3,27	0,8	3,24
GUYANA	0,4	0,63	1,2	1,69	1,4	1,77	2,0	2,48
JAMAICA	3,0	1,70	4,1	2,18	6,3	3,11	6,3	3,06
TRINIDAD & TOBAGO	1,3	1,43	2,8	2,93	1,9	1,88	1,9	1,87

COMPARISON WITH CONSUMPTION IN OTHER COUNTRIES

GERMANY (FEDERAL REPUBLIC OF)	1345,8	22,81	2122,6	34,97	2043,4	33,13	2557,6	41,40
SPAIN	171,5	5,37	318,2	9,47	509,7	14,45	562,5	15,80
U.S.A.	8343,7	42,94	10185,0	49,71	9975,0	46,63	15193,0	70,39
FRANCE	944,3	19,37	1493,5	29,42	1388,3	26,24	1618,0	30,32
UNITED KINGDOM	1068,3	19,54	1351,0	24,27	1424,6	25,16	1453,3	25,58
USSR	832,8	3,61	1001,4	4,13	1233,5	4,84	1252,6	4,86

Source: Statistical Yearbook 1977 - Unesco, Paris, 1978.

A = Consumption (Millions of metric tons).

B = Consumption per 1000 inhabitants (tons).

CHAPTER V - DISTRIBUTION

The term "distribution" is used in two different senses. Firstly, it denotes actions directed towards establishing points of contact between the producers and the recipients of the book through the marketing process. In its other meaning, the term refers to the successive steps required to engineer this meeting of interests. However, such steps are affected by circumstances that are outside the control of marketing experts and are usually the outcome of normative provisions issued by the government. In this sense, the term "circulation" is more appropriate.

It is possible to consider distribution problems outside the context of the geographical situation in which they arise. In the case of "circulation", however, the boundaries of each country determine the factors that affect the transit of books and give rise to formalities which have to be completed before the products can reach their users. In this respect, "circulation", which also affects trade within the boundaries of a single country, is specifically associated with the international book import and export trade. Although these two processes converge or coincide and are concomitant in most cases, they will be considered separately for the purposes of this study. Accordingly, this chapter will be devoted to "distribution" in the first meaning of the term, while the following chapter will deal with the question of "circulation".

However, we shall first consider some general questions that have an equal bearing on "distribution" and "circulation".

At this point, we must acknowledge the existence of a somewhat disturbing paradox: a book is not a book until it serves its specific purpose and is read. Until then, it is merely an article of merchandise on the bookshop shelf or in the publishing company's warehouse, which is not its purpose. Like any medium of communication, it only comes to life when it is received by an audience; like any written message, it does not serve its essential purpose until it is read. We cannot draw any conclusions on the size of the readership in the area from the published statistics. While we have figures for the number of books produced, none are available for book sales. Accordingly, we must have no illusions about the market prospects potentially offered by around 300 million Spanish-speaking persons.

Distribution is hampered by a variety of objective factors: the very size of the countries of the region; transport and postal services, which are nearly always unreliable, slow and expensive, while airmail charges are simply prohibitive; the sparse network of bookshops, which are nearly all in the large cities; the small number of libraries, which are poorly stocked; and, lastly, the vastness of the rural areas, where there are no points of sale and where the scattered population has far less purchasing power than city-dwellers have.

Despite these adverse factors, however, by the turn of the next century there will be a potential market of 400 million readers, greater political and economic stability, a higher level of cultural and educational development and a very low illiteracy rate.

1.1 Distribution. Marketing

Most experts are of the opinion that the traditional weakness of the publishing industry in the region lies not so much in intellectual creation or production as in distribution, which is the backbone of the marketing process. It is at this stage that publishing begins to be difficult and unpredictable, for nobody can know how the market will react until the market itself reacts.

Laudible efforts have been made by groups of publishers who have established small distribution companies to handle their own books in a certain country or in a certain geographical area comprising a number of countries.

Such distribution companies have managed to solve the distribution problem of half a dozen or so publishers. If we add to these small- or medium-sized firms the handful of large companies which have agencies or branch offices in each country, we can estimate that, at the most, only 10 per cent of the Spanish-American book production reaches its points of sale as quickly as is desirable.

The Latin American market is bedevilled with individualism, a common flaw in the make-up of all the Latin peoples. Both publisher and buyer are exclusively concerned with the furtherance of their own interests. It has happened, for instance, that publishers with a small list and limited marketing machinery who wished to export directly had so little exporting experience and knowledge of the market that they usually fell into the hands of importers whose efficiency sometimes left something to be desired. Other publishers pinned their export hopes on the number of catalogues handed over to travelling representatives who were supposed to take orders from prospective customers.

In both cases, the publisher did not know his customers or the other persons or establishments involved in the transactions, and operated in ignorance of their prospects, market and problems.

A distributor will naturally have to obtain from the publisher a large enough discount to provide a profit margin that will cover the bookseller's discount, his own many and considerable marketing expenses and the minimum level of profit needed to give capital and reserves for investment.

In the case of exports, the distributor has to allow, if not the discount given by the publisher, a comparable discount which will not disproportionately reduce the profit of the foreign buyer or make it necessary to raise the selling price of the book.

Faced with this situation, the publisher has to accept that his financial risk is related to the domestic market in his own country rather than to foreign markets, and that what might basically seem to him to be a loss of profit is offset by a considerable saving in overheads.

The large-scale distributor undoubtedly needs substantial capital resources.

This is even more true in the case of exports, since the distributor will have to allow buyers extended terms of payment.

However, assuming that all the customers meet their obligations punctually and foreign bank transfers are effected on the day of payment in the national currency (which never happens, even today), the distributor should have substantial capital resources to meet his obligations towards the publishers.

The following types of book distributors are in business in the region:

(a) Non-exclusive distributors

This type of distributor works with a number of publishing houses, on an exclusive or a non-exclusive basis. Such a firm can usually provide an effective service, as long as it does not distribute the work of more than 10 publishers.

With a few exceptions, these are firms whose strong financial position or volume of purchases enables them to obtain special discounts from the publisher. They can therefore cater for the small buyer and supply any temporary shortages at other larger bookshops which also deal directly with the publisher. They play an important and effective role in book distribution. Unfortunately, however, this type of distribution firm sometimes takes on the lists of too many publishers without providing any of them with an adequate service. The other disadvantage of such distribution firms is that they do not necessarily handle all the titles in a publisher's catalogue. They buy only the more marketable titles or subjects, refraining from the distribution of other books intended for minority readerships. This means that the publisher cannot get his complete catalogue widely distributed.

(b) Exclusive distributors

This type of distributor works exclusively for one publisher. The publisher's stocklist obviously has to be large enough to justify the overheads of the one-publisher distributor. This arrangement may sometimes be the most convenient form of marketing for the Spanish and Latin-American publisher. Ideally, it would involve one totally reliable customer. The system undoubtedly has its advantages, such as greater certainty of payment, an obligation to hold adequate stocks, lower administrative expenses, shorter and therefore more economical inspection and promotional visits, detailed information for the buyer on the soundness of the publisher, more rational advertising, and so on.

(c) Dependent distributor

Such a distributor is the branch office or warehouse of a foreign publishing company. This kind of set-up resembles the distribution arrangement described in (b).

(d) Combined distributor

Newspaper and magazine distributors today supplement their main line of business by selling children's publications, short literary works, pocket editions and other low-priced publications of relative literary merit at news-stands and bookstalls.

(e) Occasional distributor

The occasional distributor engages in sporadic transactions that require little financial outlay, distributing best-sellers and textbooks with a ready market.

(f) Specialized distributor

This type of distributor has, unfortunately, almost ceased to exist. In Latin America, it is possible to come across good bookshops which publishers consider as distributors from the point of view of discounts and payments, although their discounts are lower than the standard discounts. Such bookshops play an important part in the sale of technical books. The booksellers have a good knowledge of the subject, the market and the bibliography. Most of these firms are run by émigrés from Central European countries, which have always produced a number of excellent booksellers and book collectors.

To this summary of the general trading practices in book distribution we may add a number of observations on the legal status of the distributor.

The Spanish Law on books contains the following provisions:

"Under the terms of the book distribution contract, the distributor shall undertake the wholesale sale and the administration of a published work, for which he shall pay the publisher a previously agreed price" (Article 31). None of the legal provisions in force in the region contains a specific definition of the status of the distributor. Theoretically, his activities should conform with the norms and principles of the commercial legislation of each country. Contracts take a variety of forms. They may be verbal or be drawn up in the form of a letter; they are interpreted in accordance with the provisions governing agency, consignment, commission sales, sale-or-return arrangements or straightforward sales, according to the contractual arrangement adopted. In economic terms, they represent the delegation of a duty implicit in the many obligations which the publisher assumes, namely the obligation to disseminate the work. If the publisher does not have his own distribution organization, based locally or abroad, he enlists the services of a "distributor" who undertakes to promote and sell his publications.

Although it has so far been possible to describe the distribution process in fairly straightforward terms, circumstances sometimes rule out the adoption of a single distribution arrangement. Publishers may therefore deal with several distributors in the same market. Each distributor then does business with his regular customers and any new customers. Consequently, the nature and scope of the obligations assumed by the distributor vary in each case. The distributor's percentage or discount also differs. As we have no overall account of different distribution arrangements it is impossible to assess the number of books sold through distributors compared with those sold by publishers through their own sales organizations.

Furthermore, as in the case of publishing companies, it is difficult to determine which distributors (and booksellers, as will be seen further on) engage in only one line of activity. This situation is illustrated in Table 24. In the publication containing this table, many companies are listed under two or all three headings. It is therefore difficult to establish the number of "publishers" who are also "distributors" or "representatives" (importers) or to distinguish the latter from the former and from booksellers.

2.1 The traditional market. Bookshops

To describe the bookshops in the countries of the region is no easy task. As in the case of publishing companies, very few bookshops are engaged in a single line of business. Nonetheless, most books, particularly certain types of books, are sold through the book trade in bookshops. However, the types of bookshop vary, taking the form of "stationer and bookseller", "toyshop, stationer and bookseller", "bookseller and publisher" or "publisher and bookseller", or "distributor and bookseller", the latter also operating as an importer and, in a very few cases, as an exporter (see Table 24).

The first question (which might even be raised in connection with bookshops engaged solely in bookselling) bears upon the proportion of the constant flow of new titles actually purchased and put on sale. Whether the reader obtains the information he seeks during his visit to the bookshop (not necessarily information on a specific title but sometimes on a subject or genre) will depend on the abilities and skills of specially trained staff. Correlating both these factors, it would appear that the level of efficiency expected at a bookshop, as a link in the distribution chain, leaves much to be desired, and that this weakness impairs the bookshop's performance of its function. A bookshop should be a centre for

TABLE 24

LATIN AMERICA: PUBLISHERS, DISTRIBUTORS AND BOOKSELLERS

COUNTRY	PUBLISHERS	DISTRIBUTORS AND REPRESENTATIVES	BOOKSELLERS
ARGENTINA	186	101	381
BARBADOS	n/i	n/i	n/i
BOLIVIA	11	11	38
BRAZIL	101	51	168
COLOMBIA	17	26	66
COSTA RICA	9	6	13
CUBA	n/i	n/i	n/i
CHILE	13	26	61
ECUADOR	4	2	19
EL SALVADOR	2	2	6
GUATEMALA	4	7	18
GUYANA	n/i	n/i	n/i
HAITI	n/i	n/i	n/i
HONDURAS	1		
JAMAICA	n/i	n/i	n/i
MEXICO	91	53	191
NICARAGUA	1		10
PANAMA	7	6	16
PARAGUAY	4	5	9
PERU	32	29	52
DOMINICAN REP.	3	6	19
TRINIDAD AND TOBAGO	n/i	n/i	n/i
URUGUAY	22	23	31
VENEZUELA	18	43	59
TOTALS	526	397	1.157

Source: La empresa del libro en América Latina - Guía seleccionada de editoriales, distribuidores y librerías en América Latina, Bowker Editores, Buenos Aires, 1974.

n/i = no information available.

promoting the sale of books, but instead of that the bookseller merely responds to the influence exerted by the reading public. Naturally, there are booksellers who are an honourable exception to this rule. Such exceptions would be more numerous if publishers provided booksellers with more comprehensive and more frequent information.

While there are many city bookshops, small towns are not so well provided with bookshops; needless to say, there are virtually none at all in rural areas, which constitute a largely insignificant market in quantifiable terms.

Unfortunately, there are no statistics available for the region showing the volume of sales through bookshops and other channels. With regard to the latter, it is worthwhile considering the sale of books at "points of sale" which normally sell newspapers and magazines.

In a number of countries, newsagents' kiosks have for some years been selling books varying from novels and books published in instalments to technical publications for the general public, which are mostly brought out in the form of economy editions. They may also sell the bestsellers that are on sale in the bookshops. In some countries, books are also displayed and sold in supermarkets or "drugstores". The latter sales channel sometimes includes more expensive books - bound collections, encyclopaedias, works in series, etc. At present there is insufficient information available for gauging the proportion of total sales represented by these new bookselling methods.

A survey carried out in Brazil gives an idea of the percentage distribution of these different channels. The findings of this survey are shown in Table 25.

TABLE 25

Distribution Channels	Organization		No information available	Total
	Own	Outside		
Distributors	31.8	14.8	-	46.6
Bookshops	6.3	10.0	-	16.3
Stationers/ Variety shops	5.8	3.8	-	9.6
Schools	1.5	1.6	-	3.1
House-to-house selling	0.9	0.2	-	1.1
News-stands (Kiosks)	-	2.2	-	2.2
Libraries	0.1	0.1	-	0.2
Mail-Order sales (C.O.D.)	0.3	0.7	-	1.0
Book Clubs	-	0.1	-	0.1
Other channels*	1.3	0.9	-	2.2
No information available	-	-	17.6	17.6
Totals	48.0	34.4	17.6	100.0

NOTES: * Includes pharmacies, petrol stations, supermarkets, etc.

100% = 166,245,417 copies

Source: UMA POLITICA INTEGRADA DO LIVRO, Rio de Janeiro, Vol. 1, 1976

It will be seen that distributors account for 46.6 per cent of all sales and represent the distribution channel most commonly used. Of this percentage, 31.8 per cent of distributors are publisher-owned organizations. Book clubs are the least used distribution channel, followed by libraries.

The decision to market book production through a certain distribution channel affects all sorts of things, from the possibility of publishing or republishing a work to book-design considerations. It also makes it possible to study pricing in relation to the potential readership, since the financial outlay of the publisher or distributor varies according to the cost of the selected distribution channel.

Naturally, these conditions vary according to the trade practices in each market - discounts and terms of payment - and there are no general conditions that can be regarded as a yardstick for all cases. However, with a view to obtaining some idea of distribution costs, it could be said that trade discounts are roughly in line with the figures shown in Table 26, which makes no reference to terms of payment.

This table does not contain any estimates of the financial costs of book sales (interest on credit) or promotional expenses, which are generally borne by the publisher, distributor or importer, in accordance with the terms of their contracts.

TABLE 26

ESTIMATED DISCOUNTS IN THE BOOK TRADE	BOOKS TEXTBOOKS %	 OTHERS %
1. Discounts on retail price allowed to the bookseller by the publisher, importer or distributor for normal transactions	20 / 25	30 / 45
2. Discounts on retail price allowed to the distributor by the publisher for normal transactions	30 / 40	40 / 50
3. Discounts on retail price allowed by the publisher or distributor for sales through the newspaper and magazine distribution network		48 / 52
LOCAL DOOR-TO-DOOR SALES ON CREDIT		
The costs vary depending on whether the publishers or distributors have their own sales organization		
1. In the first case, commissions on the retail price are paid to door-to-door salesmen selling on credit (or agents or sales representatives); these commissions include employers' social insurance contributions and collection costs, without taking into account the cost of financing		35 / 50

LOCAL DOOR-TO-DOOR SALES ON CREDIT	BOOKS	
	TEXTBOOKS %	OTHERS %
2. In the second case, the cost would be the difference (in percentage terms) between the retail price, without taking into account the cost of financing, and the price paid to the publisher by the sales organization distributing the work		75 / 85
EXPORT OPERATIONS		
Usual discounts on normal transactions without taking into account dispatch charges		

The promotional and sales methods introduced in a number of countries in the area may be summarized as follows:

(a) Door-to-door selling on credit. This method is used in several countries, and has had the greatest success with works such as encylopaedias, dictionaries and so on. It has been used for some years to sell books that people need in connection with their work. In some countries, where the claims of employees and the inflation rate are putting considerable pressure on firms and on the economic system in general, the future of this method, which is centred around the work of sales representatives and travelling salesmen, does not look very bright.

(b) Direct mail sales. Lack of familiarity with this method of selling and inefficiency on the part of many of the services needed to operate it, coupled with low reply rates, do not hold out very attractive prospects for this method, which has been tried out in a number of communities without any success to date.

(c) Supermarket sales. This method has been introduced in a number of countries, with varying degrees of success, for different types of publications. It could be maintained that it has been favourably received, although the degree of acceptance and supply patterns have differed according to the behaviour of the local public.

(d) Sales at newsagents' kiosks or news-stands. The total use of the newspaper and magazine distribution services or their partial use or use in conjunction with other channels (using only the news-stand network of these publications) has been favourably received in those countries where it has been introduced, despite the high cost of this form of distribution. This channel is a particularly effective means of selling books designed for the occasional buyer.

(e) Bookmobile sales. A bookmobile is a small itinerant bookshop which serves both as a kind of book fair and as a bookshop. Bookmobile selling has been tried successfully in various countries outside the region, and was even introduced a number of years ago in one country of the region. Bookmobile selling is ideally suited for areas which are poorly served by the network of bookshops. It is particularly advantageous in rural areas with a scattered population. Although nothing along these lines is being done in Latin America at present, an attempt could be made to introduce this method of bookselling as a follow-up and reinforcement of the work done by radio schools and television schools.

(f) The market for the new distribution channels. No information is available on the percentage and value of the copies sold in each country through unconventional channels such as those listed above.

3.1 New markets

The conventional publisher who is attached to traditional publishing practices and devoted to his regular customers, will inevitably prefer to do business with the bookseller and the distributor, who have proved to be the mainstay of his trade over the years. However, it is also certain that both the publisher and the distributor will have to seek alternative channels to the bookseller, in view of the sheer number of titles published each year, the new specializations, the treatment of books as "consumer goods", the poorly stocked bookshops, and so on.

"Conventional bookselling" is generally understood to mean the sale of books through the system of bookshops and distributors. Any other bookselling methods are regarded as "new-fangled". In this sense, direct mail sales, door-to-door sales on credit, book clubs, bookmobile sales and sales at supermarkets and newsagents' kiosks may be regarded as new methods of selling.

Leaving aside any consideration of the numerous and varied techniques involved in selling books, the main new bookselling methods employed in the countries of the region are briefly described below:

(a) the different forms of mail-order selling have had varying results, although, broadly speaking, this method of selling has not been as successful as expected. Mail-order selling can be effective in large countries, particularly when consumers are used to buying other goods by mail order. However, a successful mail-order operation is dependent on the existence of an efficient postal service, a swift and safe money transfer system and specially trained staff.

(b) Door-to-door selling on credit is perhaps the most important of all the methods of selling, particularly in comparatively underdeveloped countries. It fills the gaps in the conventional distribution channels and extends the market in certain sectors. It has its limitations, and is generally used to market larger works or series. However, the greatest difficulty in connection with door-to-door selling arises from the serious depreciation of outstanding accounts in countries with high rates of inflation and from the high percentages of bad debts. Constant wage demands also have an effect on door-to-door selling, and the costs of the agent, representative or door-to-door salesman represent such a high proportion of the total price that the prospects for this system of selling do not look promising.

(c) The method of selling books through bookmobiles offers scope for further development. These small itinerant bookshops have gained a certain degree of acceptance over a period of years in a number of countries (Mexico for instant). This method requires quite a large capital outlay, which not all producers and distributors can afford.

(d) With the exception of the business organization using the name "book club" book clubs have not made a great impression on the market. Brazil is, perhaps, the country where the system is most widespread and which offers the best conditions for its development. According to one of its most enthusiastic supporters, the Book Circle in Brazil has, in less than six years, built up a membership of 650,000 who buy more than three million books a year. Furthermore, he maintains that book clubs do not compete with conventional publishers or take customers away from bookshops. He recognizes that the new reader who is "produced" by this system will continue to have broader cultural and informational needs that will only be met by bookshops, which are the true "habitat" of the book.(1)

(e) Supermarket and news-stand sales have definitely been accepted as a form of book distribution, although it has to be recognized that such points of sale do not operate effectively in all the countries of the region.

The detailed examination of various other systems and techniques lies outside the scope of this work. Generally speaking, these systems and techniques are built around the sale of books on specific subjects in conjunction with other products. In this new approach to selling and advertising, the publisher markets his books through establishments outside the book trade. Examples of this practice are the sale of children's books in large stores and toyshops; the sale of books on sport at sports shops; the sale of pocket editions and cheap editions at general stores; the sale of books on dietetics and nature cures at herbalists; the sale of books on motoring at car accessory shops, and so on.

The above points show that, regardless of the efficiency of the conventional bookseller in terms of his experience, facilities and information, he caters for no more than a limited sector of society at large, and also that, as he cannot cater for the potential market in its entirety, other marketing approaches using different methods can reach specific sectors of society with their own special concerns. In the long term, this will foster the habit of buying and reading books and will broaden the range of customers of the traditional bookseller.

This brief survey of the composition of the book trade strengthens the arguments of those who maintain that the major problem in book marketing in the region lies in distribution. This situation is all the more serious because little is known about resources, trends and possibilities in this field.(2)

4.1 The institutional market. Libraries

This survey of book consumers in Latin American countries would be incomplete without some mention of public and private libraries. Public libraries (which include depository libraries in countries where the "legal deposit" requirement is in force as part of the copyright protection legislation) are starved of books, owing to the lack of funds for making regular purchases of the growing number of titles continually produced by the book industry.

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(1) COHEN, Raymond, Clubes do Livro, Seminário sobre Distribuição e Promoção do Livro, CERLAL, Fundação Getulio Vargas, Río de Janeiro, 1978.

(2) LEWY, Peter, La Librería. Breve esbozo de su situación actual. Seminar on Book Distribution and Promotion - CERLAL - Fundação Getulio Vargas, Rio de Janeiro, 1978.

One of the reasons for the Latin American publisher's decision to restrict the size of an edition is the lack of a sound and reliable basis for marketing his products. In European countries and the United States in particular, the publisher can normally rely on a certain basic market. His main customers are libraries, which are the consumers par excellence of a certain proportion of each edition.

A more careful study of the library system should be made, since libraries are not merely institutions providing certain services for their readers but are also important as book buyers. The library system, which comprises both public and private libraries (including company or factory libraries and trade-union libraries), should also provide a basis for book distribution which will allow of more optimistic print calculations, sound payment procedures and promotion at a reasonable cost. In structural terms, the library should become the "institutional market" par excellence for the publishers of the region.

None the less, it has to be recognized that there are other difficulties than those of the libraries themselves. There has been no significant change of attitude among publishers, distributors and booksellers towards the potential market represented by this new type of large-scale book consumer. The emergence of a new kind of consumer with special requirements creates a need for product diversification and careful attention to book design. It also calls for a new approach to sales and the general services which should be made available to these purchasers.

Discussions on these problems led to the conclusions contained in the final report of the seminar on Book Distribution and Promotion, held in Rio de Janeiro in 1978. These conclusions were as follows:

The consumers of the broadest range of publications are still public and private libraries. Since public library systems have developed on such a large scale, the various high-level official bodies should formulate clear-cut policies designed to strengthen public libraries from the operational and financial points of view, while endeavouring, as far as possible, to co-ordinate their activities with the work of private institutions and enterprises:

(a) Governments should make arrangements for the compilation of directories of public libraries, school libraries open to the public, university libraries and specialized libraries, containing basic information for the bookseller about the specific interests of users and the administrative structure of the different units in the system.

(b) Publishers, printers and booksellers should undertake the periodical preparation of a publishing directory containing the most important information on their activities, services, head offices, categories of publication produced and so on.

(c) Steps should also be taken to plan communication systems which strengthen their common interests, further the social aims of culture and are likely to result in a marketing system that is suited to the kind of book consumer envisaged, avoiding channels which put up the price of books or make them difficult to obtain. In particular, publishers should produce information suited to the special purchasing requirements of bookshops and libraries.

Evidence of the paucity of this kind of information will be found in Table 27, which we have prepared with a view to giving an overall picture of the libraries in the countries of the region.

TABLE 27

LIBRARIES IN LATIN AMERICA

COUNTRY	YEAR	NATIONAL LIBRARIES		UNIVERSITY LIBRARIES		SCHOOL LIBRARIES		SPECIAL LIBRARIES		PUBLIC LIBRARIES	
		NUMBER	VOLUMES (1000)	NUMBER	VOLUMES (1000)	NUMBER	VOLUMES (1000)	NUMBER	VOLUMES (1000)	NUMBER	VOLUMES (1000)
ARGENTINA	1974	1	2330	29	2136	-	-	-	-	1513	8535
BOLIVIA	1970	1	150	7	185	146	210	15	15	105	350
BRAZIL	1974	1	2624	613	9412	-	-	572	7528	2332	12669
COLOMBIA	1967	1(1974)	450(1974)	85	856	572	924	56	309	129	547
COSTA RICA	1968	1(1971)	200(1971)	1	80	43	93	24	111	(1971) 12	2839
CUBA	1971	1	444	(1962) 17	(1962) 406	(1962) 150	(1962) 403	178	(1962) 111	53	850
CHILE	1974	1	2000	(1969) 80	-	(1969) 340	-	(1969) 28	149	718	-
ECUADOR	1962	1	-	11	-	90	-	-	-	90	2540
EL SALVADOR	1966	1	85	9	76	191	22	54	-	42	-
GUATEMALA	1974	1	361	3	24	1	4	3	73	3	54
HAITI	1964	1	19	8	73	17	17	20	50	10	35
HONDURAS	1969	1	55	1	20	30	40	9	27	4	20
MEXICO	1974	3	963	190	1511	1004	2132	121	882	1084	2777
NICARAGUA	1962	1	70	2	-	-	-	-	-	15	-
PANAMA	1966	1	1277	1	15000	18	80	24	287	127	1625
PARAGUAY	1962	1	-	2	8	47	25	2	2	-	-
PERU	1974	1	641	1	1	31	-	101	4556	213	1899
DOMINICAN REPUBLIC	1964/8	1	800	3	100	19	11	-	-	66	54
URUGUAY	1974	1	554	4	132	1	7	1	119	-	-
VENEZUELA	1969	1(1971)	500	10	370	240	1	(1971) 3	(1971) 70	294	-
BARBADOS	1970	-	-	1	-	-	-	-	-	11	-
GUYANA	1964	-	-	1	7	6	10	3	7	(1971) 126	(1971) 1702
JAMAICA	1968	1	68	2	129	791	266	19	123	1	581
TRINIDAD AND TOGABO	1974	-	-	1	140	-	-	1	5	2	343

Source: Data prior to 1971 - América en cifras 1972
Data since 1971 - Unesco Statistical Yearbook 1977 - Paris, 1978

This inadequacy has assumed serious proportions, even though specialists recognize that books and libraries are essential for the improvement of educational resources and services, as well as for the furtherance of science, culture and economic and social progress in Latin America.

Furthermore, it has become clear that a special effort must be made to improve public and school libraries so as to ensure that they provide reading materials which complement the prescribed textbooks and serve as a basis for continuing education, whether formal or informal.

The crucial factor is the availability of suitable reading materials. Unless libraries stock books suited to the reading ability of the population, they will inevitably continue to serve a small proportion of the population only, and "people's libraries" will rely almost completely on collections of textbooks. In neither case will the reading needs of the adult population nor the school population be satisfied.

The following figures give some idea of the reading levels of people who have attended school. These rough calculations were made in the sixties with respect to sixteen Latin American countries:

> Two per cent advanced readers who read easily (mainly persons who have attended secondary school or who have continued to practise their reading after leaving primary school).
>
> Twenty per cent functional readers whose reading ability is stabilized and whose progress depends more on the availability of interesting reading materials than on their ability to overcome mechanical reading difficulties (this group consists mainly of persons who have completed 3-6 years' primary education).
>
> Twenty per cent elementary readers who need fairly simple materials to improve their reading skill (mainly persons who have not got beyond the third grade).
>
> Fifty-eight per cent beginners who are still learning to read (mainly persons who have had some reading instruction at primary school or through literacy programmes).

Until recently, roughly half the adult population had had no opportunity to learn to read. Public library services should be planned in such a way that they play an active part in programmes designed to raise present reading levels and teach illiterates to read.

It is somewhat more difficult to determine the percentages for the different reading levels among children and adolescents, including schoolchildren and drop-outs under the age of 15. Nevertheless, in the 15-24 age group, 3.5 per cent may be classified as advanced readers, while some 23 per cent probably fall into the category of elementary or functional readers, and almost 23 per cent are beginners.

Taking newspaper circulation (11 million copies) as a yardstick for the measurement of reading ability, we find that only one out of seven literate adults in Latin America reads (or buys) newspapers. On the analogy of similar statistics for other regions of the world, we may conclude that only some 6 per cent of literate adults in Latin America read books. Studies on the reading ability and reading habits of school pupils show that probably little more than 7 per cent (4 million out of a total of 54 million) read or are able to read the books available to them.

It may therefore be calculated that the readership of materials for adults in public libraries numbers some 9 million adults and adolescents.

Public library services should be adapted so that they provide programmes which encourage children to read while at school and to continue their reading after leaving school. In the coming years, special efforts will have to be made to cater for the adolescent reader, whether at school or not, with a view to providing him with reading materials suited to his constantly changing interests. School library services, in both primary and secondary schools, should actively back up reading instruction by furnishing both the materials needed to improve individual pupils' reading ability and the additional information required to complement the teaching process.

Far more reading materials are required to meet present needs than the existing library services can supply. The authorities have failed to keep abreast of demand as regards the number of libraries and volumes and also as regards the scope and quality of the services provided. Steps must be taken to improve and expand public and school libraries and the services they provide, so that the peoples of Latin America will have a chance to acquire the knowledge and information they need. Moreover, the plans made for the provision of library services should take into account population growth and the number of children and adults they will have to serve. Such action is long overdue.

The main needs for the improvement and extension of public and school libraries in Latin America are: (1) more and better collections of books and other reading matter and of audio-visual materials; (2) better organization of collections and services; (3) more qualified library staff and (4) more and better buildings and equipment, including mobile libraries.

However, with a view to facilitating the improvement and extension of library services in Latin America, attention should also be given to a fifth need, the need to strengthen and extend international programmes aimed at promoting better library and bibliographical services.(1)

5.1 Problems connected with bibliographical information and with technical and professional training

Ever since printing was invented, people have tried to plan an international system of bibliographical information.

A German librarian, Martin W. Schreltinger, formulated a plan for a universal bibliography in 1810; he was perhaps the first person to do so.

A number of attempts were subsequently made to compile such a bibliography on the basis of various principles. We shall not go into the question here, but merely point out how necessary and how important such a bibliography is.

In 1966, various studies of UNISIST - the World Scientific Information System - were undertaken jointly by ICSU and Unesco.

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(1) DANIELS, Marietta. Bibliotecas Públicas y Escolares en América Latina, Washington, D.C. Pan-American Union, 1963. .

IFLA (the International Federation of Library Associations) proposed the development of a universal system for the control and exchange of bibliographical information, which was to be known as Universal Bibliographic Control and has been adopted by Unesco in its bibliographical activities.

The International Congress on National Bibliographies, sponsored jointly by IFLA and Unesco, was held in Paris in 1977 with a view to the joint establishment of the technical standards required for the implementation of this system. The agreement finally reached at this meeting was reflected in the list of recommendations contained in the final report of the congress. On the basis of these recommendations and technical standards, each country must now assume responsibility for the compilation and publication of its own current national bibliography Some countries have made greater efforts than others to compile their own bibliography, but they have all fallen short of the requirements in this field. Modern methods and the technology available for this work may facilitate the compilation of bibliographies and the updating of existing bibliographies.

There is no need to give a detailed account of the numerous meetings and initiatives held on this subject in the region, and we shall mention only the main points, so that the reader will have a general idea of the situation.

The first Latin American Seminar on Control and Acquisition of Bibliographic Materials was held in Bogotá towards the end of 1975. It was sponsored and organized by Unesco, CERLAL and the Colombian Institute for the Development of Higher Education (ICFES). The seminar was attended by directors of the national libraries of Spain and the Spanish National Book Institute, representatives of Unesco, the Ibero-American Bureau of Education, the OAS and the Andrés Bello Convention, in addition to a number of representatives of Colombian university libraries and specialized libraries.

In the course of the proceedings, it was stated that for some years the Latin American countries had made considerable efforts to compile their bibliographies. But because of the shortage of resources, the absence of a national bibliographical structure capable of ensuring that the basic information was efficiently compiled and lack of continuity in the efforts made, only incomplete lists of a small proportion of the publications of these countries have been published, and not always regularly at that. There is therefore no record of what has been done by the countries of Latin America in the various fields of culture. The result is that little is known of their valuable contribution to the cultural development of mankind, and the general public has a false impression of their creative abilities.

In this context, it is to be noted that a group of bibliographers, with the support of Unesco and the Spanish Government, embarked upon the compilation of the bibliography of Central America and the Caribbean, which was published in the sixties in seven consecutive editions. For the reasons indicated above, they were forced to shelve this important undertaking. Subsequently, on the establishment of the Andrés Bello Convention, the Ministers of Education of the Andean area entrusted Venezuela with the responsibility for a project on the development of Library and Scientific and Technical Information Services. The Venezuelan Government sought to carry this plan into effect by organizing two Working Groups on the Development of Library and Information Services in the countries bound by the Andrés Bello Convention. These Working Groups met in Caracas in November 1971 and in Quirama, Medellín (Colombia) in November 1972.

The final reports of these meetings, known as DEBICYT-1 and DEBICYT-2, were ratified by the Ministers of Education of the signatory countries, and the necessary legal framework for the implementation and application of the recommendation was established.

The recommendations suggested that the countries of the area should compile the bibliography of the signatories of the Andrés Bello Convention and of Spain, on the basis of the format developed by Spain in co-ordination with CERLAL.

Since then, efforts have been made to implement these recommendations, and CERLAL has begun to publish a bibliographic bulletin, in view of the delays caused by the need to make the Spanish bibliographical data format compatible with international formats.

In view of the tasks already discussed and the desirability of having a common systematic record of bibliographical material produced in the different countries, the seminar considered that the bibliography of Latin America and Spain should be compiled. To this end, it was decided to seek the introduction of National Bibliographic Control and the different mechanisms needed to achieve it. Taking as their starting-point the general framework of the National Information Systems (NATIS), which have been promoted by Unesco for some years, the various speakers pointed out the need for action in matters such as the compilation and publication of the national bibliography, retrospective specialized bibliographies, standardization of the information register and the adoption of internationally compatible automated registration formats.

Each country's legal deposit system, which is an essential means of ensuring national bibliographic control, was studied by the directors or representatives of the national libraries, and information was given about what legislation was in force in each country.

The views expressed indicate that national libraries are concerned to fulfil their role as depositories entrusted with the task of handing down the national heritage, and that criteria and mechanisms for the compilation of the Latin American and Spanish bibliography need to be updated.

The recommendations made on that occasion concerned the following points, amongst others: the content of bibliographies; the training and exchange of personnel; the adoption of the ISBN system for numbering all the books published in each country, basic standards to ensure compatibility in the exchange of bibliographical information, and cataloguing in source.

At the seminar held in Rio de Janeiro towards the end of 1978, these three points were examined from various angles. The resolutions approved at this seminar included, as we have seen, the adoption of the ISBN, since it was considered that this sytem would help towards the development of the publishing industry and the book trade and would ultimately contribute to the dissemination of printed works, which is the cornerstone of the development and future progress of the countries of the region.

It was furthermore pointed out that today information gathering and processing are the essential raw material for every stage of the process of publishing, and that the services of modern technology must be enlisted, for this purpose, computers and other mechanized systems being used for data processing and the compilation of national bibliographies. Attention was also drawn to the importance of the co-operation of publishers in carrying out these activities. Some countries have already sought to facilitate bibliographic control by introducing the ISBN system.

Concern has also been expressed about the education and technical training of qualified staff to meet today's requirements in library science. Despite the varying degree of development among the countries of the region, a number of characteristics, inadequacies and problems are common to all of them.

With a few exceptions, however, the training received by the prospective librarian reflects an outmoded conception of his function; he is expected merely to assemble and classify material and to wait for requests for information. Information services are provided by a traditional system consisting of the national library, university libraries, specialized libraries and public libraries. There are insufficient technical and financial resources to extend and increase the dissemination of books through these institutions.

An increasing number of courses, meetings and congresses are being held to discuss this question, and the past few years have seen the establishment of bodies specifically devoted to training personnel in the different branches of library science, which have gained in status at the different levels of education.

CHAPTER VI - CIRCULATION

1.1 Scope of the chapter. Import régime

The term "circulation" refers to the different stages and channels through which a book has to pass before reaching the reader. Books are subject to specific regulations which usually form part of other bodies of normative provisions and do not always take into account the nature of the product to be transported. Our study of this point will cover the administrative, economic and customs measures which are applied in the domestic market but which also regulate the transport of books or their importation into other countries.

This question is a cause of major concern in the book trade at present. It is more important than the commercial aspects of the matter or the mere physical transportation of books. Through the incorrect or arbitrary application of the provisions which regulate such trade, policies may be formulated that do not reflect the principles upon which modern society is based. The free circulation of books is directly linked to the free circulation of ideas, which is the keystone of a world in which people are increasingly interdependent in every way and which cannot be united unless information about the achievements of human creativity is exchanged without restriction.

If the governments of the region were asked whether the importation of books is hampered or restricted in their countries, they would all answer that it is not. The official provisions reflect a favourable attitude towards the free entry of books. In practice, however, the situation is quite different.

In certain countries, a completely open-door policy is adopted with regard to books and publications in general. In other countries, where imports are not actually prohibited, numbers of complicated requirements and other difficulties are put in their way. In practice, there is a wide range of restrictions which would seem to suggest the operation of a kind of masked protectionism against imports.

The most common examples of such practices are advance deposits, import licences, exchange permits, the establishment of waiting periods for payments or the transfer of foreign currency, "statistical control-fees", sales taxes, consular fees, the compulsory use of national vessels, import quotas, advance censorship, etc. The list of such obstacles of itself shows that the apparent liberality of the general norms and the impression obtained by simply reading the items on the customs nomenclature belie the realities of the situation, which is characterized by a network of provisions that are not even mentioned in the regional agreements and that each government applies as and when it pleases.

We shall illustrate this point by referring to a number of common practices in the region.

Firstly, it is not always easy to understand why such a long time elapses between the dispatch of goods in the country of origin and their receipt by the consignee. In certain Latin American countries, registered mail arrives at ports away from the capital or other major consumer cities. In such cases, excessive delays occur before the mail is transported from the port of arrival to the central customs depot in the capital and from there to the cities of destination.

Owing to inadequate port facilities and a shortage of transport, mail bags have been held up at ports for up to six months, while consignees complain to exporters that they have not received their orders.

For this reason, books which could run into three, four or five editions are limited to a single edition, the copies of which arrive long after the publication date and so lose their marketability in areas on which the publishers had relied when drawing up their publishing schedule and planning the size of editions.

Furthermore, virtually none of the countries of the region have customs-houses where goods are expeditiously classified and cleared.

Indeed, the material facilities offered by some of the Latin American customs services leave something to be desired. One common problem is the fact that the customs buildings are too small to deal with all the shipments that arrive. Then again, in some customs buildings security arrangements are unsatisfactory, with the result that parcels and packages are frequently lost. Lastly, customs services are understaffed or staffed by poorly trained workers.

For reasons connected with their balance of payments, some countries have had to introduce import quotas, which are applied to books as well as to other goods. Other countries, which do not restrict book imports by means of quotas, have introduced irksome, complicated formalities involving pro-forma invoices and countless forms and declarations, which lead to indifference on the part of importers and delays in the delivery of orders.

Another problem, which has adverse effects on imports and, consequently, on the book trade at large, is caused by the constant devaluations, to a greater or lesser degree of national currencies. Importers are continually faced with economic measures of this kind. Nothing has been done so far to offer them the possibility of taking out an exchange bond which would enable them to sell all their stocks at prices reflecting their cost. This would be an exceptional measure, but justified in view of the exceptional nature of the goods in which they trade. Only Argentina has authorized importers to take out an exchange bond covering the amounts which they pay the banks in the national currency. This has eased the situation of many firms heavily indebted to foreign companies.

Exporters frequently have to demand payment from banks rather than from their customers. It often happens that a customer who believes that an invoice has been settled receives a demand for payment from the exporter, to the natural displeasure of both parties, when the bank, not the buyer, is responsible for such embarrassing situations. The bank has simply received the payment in the national currency and held back the transfer or the cheque.

According to the internal regulations in certain countries, foreign remittances are subject to delays or currency authorizations from the central banks.

However, it is quite wrong and inadmissible that banks should hold back payments on their own account, to their own benefit and to the detriment of the parties concerned.

It should also be pointed out that there are no provisions for certain cases, such as the forwarding of consignments by publishers, distributors and booksellers to universities, public libraries and professional persons, or the case of tourists who buy books in a country and expect them to be sent to their homes, and, in general, other persons - of whom there will be only a few - who purchase small quantities of books.

Furthermore, the interpretation of doubtful cases by the customs authorities, on the basis of the explanatory notes of NABALALC (the Brussels Tariff Nomenclature applied to LAFTA) does not take into account recent trends in the forms of books produced. The "talking book" is a frequent stumbling-block. Another is deluxe bindings. The intervention of the state authorities with a view to classifying these concepts and applying them throughout the area on a reciprocal basis would be a reasonable step forward in these matters.

However, while the latter points may be regarded as questions of detail, this is not so in the case of the documentation which may be required for the dispatch of a consignment. It is essential to introduce standard procedures in order to facilitate and speed up the formalities connected with consignments of books of any kind, whether sent by post, sea freight, air freight or any other means of conveyance.

It should be noted that nothing has come of the promising proposal to introduce a single document covering exports and imports, which would conform to the requirements of all customs authorities and even of the LAFTA officials.

A CERLAL study, which so far covers only eleven countries in the region, reveals which of the measures just described are the most serious obstacles to the free circulation of books. Table 28 shows data recorded to June 1975. It should be noted that the same regional body is at present engaged in updating this information.

Some of the data provided by a number of countries give the impression that the situation of the region in 1975 has not changed substantially. The incomplete reports which have come into our hands give some idea of the situation in different countries. In Argentina, difficulties due to the socio-economic situation, such as the delay in the delivery of foreign currency and the suspension of imports, including books, have been overcome, and it may be said that there are no restrictions or difficulties of any importance in connection with the importation of books, although unnecessary formalities are still encountered. In Bolivia, the situation remains unchanged; it is still necessary to obtain import licences for all goods, which entails inordinately lengthy formalities and excessive paperwork. In Chile, cumbersome import formalities have to be gone through at each stage of the process, which increase the cost of importing and the risks of the importer. In Paraguay, the charges of equivalent effect and other taxes bring the total tax on imported books to 9 per cent of the c.i.f. value. In Peru, a temporary "ad valorem" tax of 10 per cent of the c.i.f. value, introduced on imports in general, is also applied to books. This tax was to remain in force until 31 December 1978; we are unaware whether it has been extended. It is not applicable to books produced in LAFTA countries or countries that are signatories of the Cartagena Agreement. A 3 per cent tax on imported books is also levied in Peru. In Uruguay, the requirements and restrictions shown in Table 29 (drawn up in 1975) no longer exist.

From the above observations it will be seen that most of the difficulties encountered in the region in the international book trade are due to general economic measures which are non-discriminatory and which affect books and other cultural goods alike. Of course, this situation is partly due to unsatisfactory cultural policies that do not contain valid provisions to counter such measures. Certain governments put forward the well-worn but entirely false argument that book imports waste some of the foreign currency so badly needed for other purposes. Apart from the fact that no country should be deprived of the opportunity for access to artistic, literary, technological or scientific works produced in other parts of the world, the figures show that the so-called economic or foreign-currency problems are totally irrelevant. It is a most regrettable fact that books, at least in the countries of the region, have no effect on the balance of payments.

Table 28

IMPORT REGIME FOR BOOKS AND PRINTED MATTER
("NABALALC" TARIFF NOMENCLATURE) (1)
June 1975

COUNTRY	LEGAL REGIME	CUSTOMS DUTIES AND CHARGES % AD VALOREM							% ADVANCE DEPOSIT	% CONSULAR FEES	IMPORT QUOTAS	% DOMESTIC TAXES	OBSERVATIONS
		49.01.1.01	49.01.1.02	49.01.1.03	49.01.2.01	49.01.9.02	49.01.0.99	49.02.0.01					
ARGENTINA	Free importation	0	0	0	0	0	0	0	-	-	-	-	At least six month's delay in the delivery of foreign currency. The services of a customs agent are essential, even for small consignments. This gives rise to unnecessary costs. Sporadic cases of censorship. All imports, with the exception of those sent by international parcel post, carry a 12 per cent tax on the value of the sea or river freight charge, which goes to the National Fund for the Merchant Navy. The government has recently decreed the suspension of all imports. This is a temporary measure which affects books as well as other goods.
BOLIVIA	Free Importation	3%	3	3	3	3	3	3	-	2%	-		The consular fee is 2 per cent. There is an import stamp duty of US $1. Customs agents' fees are exorbitant. Many formalities and excessive paperwork. Some municipal councils levy a sales tax. (Some imports are also subject to a charge of 2 per cent c.i.f. for services rendered.)

COUNTRY	LEGAL REGIME	CUSTOMS DUTIES AND CHARGES % AD VALOREM							% ADVANCE DEPOSIT	% CONSULAR FEES	IMPORT QUOTAS	% DOMESTIC TAXES	OBSERVATIONS
		49.01.1.01	49.01.1.02	49.01.1.03	49.01.9.01	49.01.9.02	49.01.9.99	49.02.0.01					
BRAZIL	Free importation	0	0	0	0	0	0	0	-	-	-	-	Very lengthy customs formalities (45 days) which increase the cost of imports with a value of less than US $ 200 by up to 40 per cent. Lengthy formalities at the Central Bank. Excessive paperwork (five copies of consular invoice, five copies of export documents, various certificates - insurance, book chamber, etc.). Imports are subject to a further 20 per cent tax on the value of the sea or river freight charge, which goes towards the upkeep of the fleets.
COLOMBIA	Free importation	0	0	0	0	0	0	0	-	-	-	-	Domestic taxes: 1.5 per cent for export promotion; 3.5 per cent for consular services; this tax went up to 5 per cent on 1 October 1975. Manifest $100; import register $200; application form US $2.50; customs agents' fees, not less than US $10. Sub-item 49.02.01.00 (comic strips) carries 100 per cent tariff.
CHILE	Free importation	0	0	0	0	0	0	0	3%	-	Yes	-	3 per cent c.i.f. deposit. Currency quota for importers. Delays in obtaining foreign currency. Prohibition on financing. Fines for infringements. Censorship. 3 per cent charge on value of the freight for all imports.
ECUADOR	Free importation	0	0	0	0	0	0	0	35%	Yes	-	-	The post office levies a charge of 6 sucres per package. Port duty.
MEXICO	Free importation	0	0	0	0	0	0	0	-	Yes	-	5%	A LAFTA certificate of origin authenticated by the Chamber of Commerce is required. The fee for the consular visa is US $18. A 5 per cent tax on the "nationalization" of goods has recently been introduced. A fine is imposed for failure to obtain the consular visa.

PARAGUAY	Free importation	0,5	0,5	0,5	0,5	0,5	0,5	0,5	-	-	Yes	2%	A sales tax of 2 per cent and a port charge of 0.5 per cent - 1.8 per cent are levied. A tax is levied for the benefit of the National Institute of Technology. The exchange bond is 36 per cent.
PERU	Free importation	0	0	0	0	0	0	0	-	Yes	Yes	-	Import quotas; irritating bureaucratic formalities which have the effect of imposing surcharges in the form of warehouse charges; 4 per cent tax on sea freight.
URUGUAY	Free importation	0	0	0	0	0	0	0	-	Yes	Yes	-	Import quotas. 60 per cent of requirements is allowed. The Central Bank collects payment in cash and issues a draft payable in 150 days. Port tax of 12 per cent (c.i.f.). Cargo handling tax.
VENEZUELA	Free importation	0	0	0	0	0	0	0	-	-	-	-	

1) ITEMS OF LAFTA TARIFF NOMENCLATURE COVERING BOOKS AND PRINTED MATTER

1)	49.01.1.01	Books, pamphlets and similar printed matter, including loose-leaf publications, of a technical, scientific or educational nature
2)	49.01.1.02	Books, pamphlets and similar printed matter, including loose-leaf publications, of a devotional nature
3)	49.01.1.03	Books, pamphlets and similar printed matter, including loose-leaf publications, of the Braille and similar systems
4)	49.01.9.01	Other books
5)	49.01.9.02	Other pamphlets and similar printed matter
6)	49.02.0.01	Printed periodical publications, including illustrated periodicals

GENERAL OBSERVATIONS

I. All countries impose customs duties and charges ranging from 15 per cent to 85 per cent on editions in so-called deluxe bindings (leather, silk, mother-of-pearl, shell, ivory, amber or metal, or gilt or silver-plated bindings).

II. According to the LAFTA glossary, "FREE IMPORTATION" means that it is permissible to import the goods in question as they are not prohibited imports, and the term applies to both countries which operate a system of import permits and to those where import permits are not required. It is obvious that where imports are dependent on the issue of import licences, it is relatively easy to delay or suspend this procedure.

The available information suggests that, on average, book imports account for no more than one per cent of the total value of imports.

Moreover, it must be realized that there are no regular, up-to-date publications giving an accurate picture of the volume of trade between Latin American countries. A sufficiently analytical study of such information, covering all the data on book imports and exports and recording details of the trade of each country inside and outside the area, would be an extremely useful tool for measuring the growth potential of the existing industries and also for evaluating the prospects of achieving integration, which is increasingly necessary. At the same time, such a study would provide each government with up-to-date information affording a better understanding of the part played by books in the balances of payment of the different countries, and thus help to alter the present state of affairs.

Such a survey should include systematically presented information on other situations generally met with in the course of business operations in the book trade, such as the way in which returns, re-exports and so on are treated. A compendium of regulations is being compiled, which will improve book distribution operations in the region and will help each country to realize what it could do to solve the problems.

It must not be forgotten that these problems confront more than twenty markedly different countries, that each market has its own distinctive features and that a tradition of individualism, which is far from amenable to collective solutions, has to be overcome.

Other difficulties encountered in the distribution and circulation of books in the Latin American countries are produced by various factors connected with means and methods of transporting books. This is the subject of the next section.

2.1 Transport

Books, like other goods, have to be conveyed to customers in the domestic and international markets. Any of the channels of communication may be used for this purpose. To deal fully with the subject would entail making a detailed study of each country. However, the following outline will give the reader a general idea of the problem.

A. Domestic market. Within each country, taking into account national characteristics and current practices and legislation, a distinction should be made between the following channels of communication:

a) Postal services. In legislation on postal services provision is made for "reduced rates" and, in some cases "exemptions for book consignments". However, such rates constitute a form of concessionary treatment which is, in some cases, of a restrictive nature. In certain cases - Argentina, for instance - the reason for preferential treatment is a determination to develop the local printing industry. The application of the reduced rate may only be requested for books "published and printed" in the country. In other countries, such as Mexico, books are given preferential treatment, regardless of their origin. Colombia has adopted a position similar to that of Argentina. A mixed system is in force in Chile. Efforts now being made to ensure that the most advantageous form of circulation possible in the area is used to provide a foundation for the much-needed revision of these services, which should be standardized on the basis of a system under which reduced rates are applicable to all books, regardless of their country of origin.

(b) Other channels of communication. Road, rail, river, sea and freight services are frequently used. The costs of these services vary according to conditions in the country and the load to be transported.

B. International market. Without glossing over the various national transport problems, it must be recognized that international transportation undoubtedly presents the book trade with greater problems. Some of these stem from the existence of national boundaries, but a good many arise from the scope and limitations of the selected means of transport. The following choice is available:

(a) International postal services. Technically speaking, the area is governed by the terms of the Convention of the Postal Union of the Americas and Spain, which offers more advantageous rates than the Universal Postal Union. At a practical level, it must be admitted that the postal services are in general inefficient. This is not due to any particular policy decision on the part of the postal authorities, but to the poor state of the means of transport available for the conveyance of parcels, since the postal services use surface transport for ordinary consignments. Thus, the speed of postal operations depends on the normal rail services and the frequency of sailing of the vessels of shipping companies (and, in the latter case, of companies which have applied for the "packet-boat" privilege). There are only a few exceptions to this. If everything proceeds normally, it will take approximately three months to send a packet from Buenos Aires to a Caribbean port. If the destination of a packet requires a rail journey over the Andes from Buenos Aires to a Chilean port, whence it is forwarded by sea, the time it takes will vary, depending on whether it is winter or summer, since rail traffic is very frequently held up in the Andes during the winter. At any rate, a consignment may take between one and four or five months to arrive, depending on the destination. Transport between Mexico and the countries on the Pacific seaboard is also difficult, unreliable and unpredictable, although communications are better in this region. These problems are compounded by the growing number of books lost in transit. This new form of "duty" on consignments is also encountered at the warehouses of air cargo terminals.

According to the Convention of the Postal Union of the Americas and Spain, consignments are conveyed within the country of destination at the postal rates established in the country of origin. Countries bound by reciprocity agreements have a special arrangement covering periodicals (Argentina, Brazil, Chile, Mexico, Panama and Uruguay). The weight limits for each packet are not the same for all addressees. This makes things even more complicated.

(b) International air freight. For more than a decade it has been possible to send consignments of books by air freight at reduced rates. From the beginning, this form of transport proved an extremely effective way of avoiding the difficulties inherent in postal consignments mentioned in the preceding section. Over the years, it was found that air freight services speeded up consignments and consequently cut down the time the sender waited to be paid. Today, air freight is widely regarded as the best way of sending book consignments. The sheer distances in the area make it the obvious choice, even allowing for the drawback of the cost of air services. Costs are affected by two main factors. Firstly, rates are based on a minimum weight which is not adapted to trade requirements. As in the case of the customs regulations, no provision is made for a much-needed "small packets" system. Secondly, the rates are fixed without reference to the value of the goods transported, so that freight charges in some cases account for a proportionately high percentage of the cost of books.

Two other points have to be borne in mind.

Firstly, rates differ depending on whether traffic is in a north-south or a south-north direction, according to the regulations of the International Air Transport Association (IATA), which apply specific commodity rates for books and other printed matter. The nomenclature regulates traffic only in the direction stated and for different destinations. If the traffic is in another direction, the general rate and not the special rate is applied. The general rate is appreciably higher than the special rate. It is worth noting that the Spanish book industry enjoys special air freight rates for the tranportation of books to Latin America. Towards the end of 1978, for example, Spanish books could be transported to Argentina at 51.3 per cent of the cost of sending Argentine books to Spain.

Secondly, some concern has been caused by the change in the procedure for fixing rates, which in future will not be controlled by IATA but will be decided by each air company. This will necessitate numerous bilateral negotiations. These negotiations will have an adverse effect, since no special consideration is given to the particular requirements of the book trade.

(c) International sea freight. This form of transport is rarely used nowadays, for a variety of reasons, such as the irregularity of the traffic and the inevitable delays involved. Another disadvantage of sea freight is the lack of a special reduced rate for book consignments. Lastly, if sea freight services are used procedures are more irksome and more expensive. Consignments must be insured, port duties paid, the same customs formalities must be compiled with for books as for other cargo at the port of destination, and so on.

3.1 Protection of the language area

Among the main factors militating against the free circulation of books is the belief held by some people in the principle of protecting each language area. A paper presented on behalf of the Argentine Book Chamber at the Congress of the International Publishers Association (Amsterdam, 1968) dealt with this subject. In broad terms, it proposed that restrictive customs treatment for books printed in countries whose language is not spoken in a specific language area should be introduced in countries of this area, if the books in question are published in the language of this language area.

According to the above-mentioned document, "the area whose inhabitants speak and read Spanish has a common history and a common language. In the Latin American countries alone, more than 120,000,000 people (today almost twice as many) who speak the same language live in a vast and varied geographical area, forming a great historical and cultural community. Production capacity in the paper, printing and publishing industries throughout the area is by no means negligible. Together, the countries of the region publish a total of some 20,000 titles a year (at present more than 35,000 titles). Consequently, for Spanish-language publishers, the publication of books in a language other than that in which a community expresses itself cannot be regarded as a distinctive expression of the culture of that community, calculated to sustain its development, if the intended readers are not members of such a community. Such publications, intended entirely for export and for consumption in communities speaking a different language, are generally planned on the basis of cost considerations and are not chosen for cultural reasons. The intention is to turn this form of cultural exchange into a large-scale commercial venture. As a result, books lose the distinctive characteristics that entitle them to special customs treatment and become an aggressively marketed commercial product like any other. It goes without saying that this detracts from the cultural considerations on which the principles of free circulation are based. No developed area will be able to justify such practices by invoking these principles, because it is obvious that practices of this kind are governed by considerations of commercial advantage that are not decided by the importing area but imposed by the exporting country. The latter competes, to its sole advantage, on an exclusively economic plane, because it possesses resources which are the fruit of a level of development that should be placed at the disposal of the less-developed area, instead of serving to extract from it vast amounts of foreign currency and deprive the countries in this area of work and opportunities for advancement.

Publishers in the Spanish-speaking area take the view expressed in this paper - that language areas are areas which have their own cultural characteristics and economic conditions. When the cultural features in this area make publishing economically feasible, no arguments or principles can prevent publishing from developing harmoniously, as an industry, at a satisfactory and appropriate pace, in relation to the other cultural and economic advances in the area in question.

This idea, together with a number of new theories in support of it, was first put forward at the congresses of publishers held in Santiago de Chile (1946) and Buenos Aires (1948). At that time one commonly found works printed in Spanish in non-Spanish-speaking countries. The distortions of vocabulary and the poor command of idiomatic expressions generated an awareness of the need to preserve the language as part of the cultural heritage. Brazil was the first country to issue norms to ensure the correct use of language. After this, however, a fully-fledged publishing industry developed in many of the countries of the area. Today, there is a further reason for preserving the language: the language area must be protected as a common economic and regional space, sustained by a common culture and history. Such a union of principles is most clearly reflected in the Mexican customs legislation which provides for surcharges on imported books printed in countries which do not speak the language in which they are published. This mature approach to the problem culminated in the Ibero-American Congress of Book Associations and Book Chambers (Mexico, 1964), at which it was unanimously resolved.

"1. To ratify the spirit of the text contained in item 3 of the First Meeting of Latin American Publishers, held in Santiago de Chile in 1946: That in accordance with the considerations set forth in separate agreements an effort should be made to introduce permanent legislation which will ensure that books are circulated and imported on the widest possible scale, the only exception to this provision being books printed in Spanish in countries whose official language is not Spanish.

2. To advise governments that the best way of defending the Ibero-American language area is to protect their publishing industries so that they will be in a better position to face the competition resulting from the expansion of the publishing industries of countries in other areas, strengthening the ties which exist or can be forged between Ibero-American publishers with a view to the gradual elimination of internal barriers.

3. That all the bodies which belong to the Ibero-American Federation of Publishers and Booksellers should take steps to ensure that their governments introduce legislation to protect, ensure and promote the free importation and circulation of publications, provided that they are printed in the language of the country of publication, and to levy import duty on works published in Spanish or Portuguese in countries which are not Spanish-speaking or Portuguese-speaking.

4. To exempt from such duty the publications of intergovernmental bodies, language textbooks, multilingual editions, and publications produced under co-publishing schemes involving publishers of the Ibero-American area, provided that

such schemes are genuine and conform with the norms to be established at the earliest possible date by the Ibero-American Federation of Publishers and Booksellers.

5. To recommend that the governments, in accordance with the policy established by the particular intergovernmental bodies concerned, devote their fullest attention and the maximum resources and economic incentives to cultural promotion at all educational and occupational levels and, in particular, to the attainment of the following goals:

(a) the elimination of illiteracy;

(b) effective access to education at all levels and the introduction of compulsory primary education and, where appropriate, compulsory secondary education;

(c) the official encouragement of library services designed to develop the reading habit among all sectors of the population.

6. To recommend that Ibero-American publishers exercise care with regard to the linguistic aspects of their publications so that they can be fully understood throughout the Spanish-speaking world".

The principle of protecting the language area is advocated with a view to the attainment of a twofold aim. Firstly, it is directed to the preservation of the cultural heritage of a specific area. Secondly, it is aimed at precluding the adverse effects of a commercial war founded solely and exclusively on the culturally detrimental domination of a less-developed area by one that is more developed, under the pretext of freedom of circulation. In point of fact, such circulation is not reciprocal; it merely serves to meet a need for exporting and, consequently, should not give any entitlement to the preferential treatment which books can enjoy as cultural objects.

The above-mentioned document states that it should be understood that the intention is not to establish a regional monopoly but to introduce reasonable conditions for the development of strong, soundly-based publishing industries in each area.

The Argentine Republic responded to such concerns by adopting Law No. 20.380 in 1973. The statement accompanying the legal provision known as the Argentine Book Law expressly refers to the protection of the language area, envisaging that such protection will be ensured through the application of duties and charges established in the tariff for imported printing paper. The document goes on to state that this measure will discourage the importation of books in Spanish which have been printed in non-Spanish-speaking countries, with a view to protecting the linguistic heritage and supporting national authors and the printing industry by giving them a better chance to develop and to meet in full the needs of the publishing industry.

This principle is embodied in Article 6 of Law No. 20.380, which provides that imports of books printed in Spanish that fall into the above category should carry a tax not lower than the tax on imported paper to be used for printing books.

The decision to introduce this duty was based on sound reasons; it was thought to be the best way of ensuring that the publishing industry of the country does not suffer any obvious disadvantage. It was made quite clear that the entry of such publications is not prohibited. They merely carry a duty that is equal to the percentage that would be levied on the importation of the essential raw material contained in the product. The exceptions provided for in the law are designed to meet reasonable needs. They include such publications as books published by international bodies, books published under authorized co-publishing schemes and language textbooks.

These considerations suggest that some degree of inconsistency between the basic aspects covered is inevitable. On the one hand, the "protection of the language area" implies a series of measures that benefit a cultural and geographical community in view of the unequal strength of more highly developed publishing industries in other geographical and language areas. What is advantageous to some countries is detrimental to others. This seriously affects the principle of the free circulation of books or the furtherance of the distinctive standards of socio-economic development and the different cultural and social levels of such communities. These inconsistencies are coupled with factors that make the issue even more complicated, such as the presence of multinational publishing companies in the countries of the area, the exclusive right of translation into a single language, the existence of varied customs arrangements and of fiscal treatment which differs according to whether the respective country of the area is an importer or an exporter, and so on.

4.1 Action to promote free circulation and develop a regional book community

The problems of the book trade today cannot be regarded as peculiar to any specific nation, service or milieu, none of which is in itself capable of meeting the demands imposed by the principles of free circulation. These principles encompass more than ad hoc measures that can be adopted unilaterally.

Such problems have to be approached at the level of intra-regional trade, without any specific reference to the local problems of the countries of the region. The unremitting struggle of these countries to attain a higher level of development will not be successful unless a joint policy, based on co-operation is adopted, which will help them to face present and future changes and whose underlying principles and goals are shared by them all.

In the world context, Unesco has been extremely active in this field, promoting accessions to the Agreement on the Importation of Educational, Scientific and Cultural Materials (Florence, 1950). However, this agreement is so broad-ranging, covering as it does both educational, scientific and technical material and works of art, that it has given rise to certain reservations among Latin American countries. In fact, only six of these countries (which are not exactly the most important countries) have acceded to the agreement.

With a view to attaining the same goals by other means, a start has been made on the development of regional activities designed to promote an agreement concerned solely with books and other printed materials.

The first step towards investigating the difficulties and studying the best means of overcoming them was the convening of two sectoral meetings within the framework of the Latin American Free Trade Association (LAFTA). The first of these meetings was organized by CERLAL (in 1973); the second was arranged by the publishing industry itself (in 1974). They were held in Montevideo and were attended by delegations from the publishing industries of all the countries in the LAFTA system. The purpose of these meetings was to discuss the above-mentioned matters and the ideal of establishing a common market for books in the region.

Although the subject was thoroughly examined at these meetings, the discussions failed to produce a draft of a legally binding instrument, since the meetings were merely consultative in nature. At the first meeting seventeen recommendations were made to the Standing Executive Committee of LAFTA. At the 1974 meeting, six recommendations were approved, although three were later dropped for various reasons. The twenty recommendations may be summed up in the following aims, which are regarded as essential to a comprehensive treatment of the questions under consideration:

1. The establishment of conditions that will be conducive to the creation of a common market for books in Latin America. The other recommendations should be considered in the light of this aim.

2. Liberalization of trade in and the transit of books, magazines and other publications included in chapter 49 of the Brussels Tariff Nomenclature (BTN) in force at the time. The attainment of these objectives called for various measures, including the following:

(a) the abolition of any system which entails: advance deposits, advance exchange or import permits or comparable treatment; fixed time-limits for the payment of remittances; statistical control-fees and similar charges; internal taxes, duties or other charges levied on imported products at the time of their introduction or afterwards; consular duties, charges and fees; discrimination between groups of books when such discrimination reflects the intention to restrict shipments by sea to vessels sailing under the national flag, whereas it is advocated that all flags of the area should have equal status; restrictions that result from foreign exchange quotas; the compulsory use of the services of a customs agent and/or exchange broker (which should be made optional); and consular invoices;

(b) the introduction of standard criteria for the treatment of demurrage, warehouse charges and other similar duties; the application to consignments of the treatment afforded to perishable goods; regulation of the procedure for the practice of "censorship" on the basis of the recognition of the right to have the goods returned to the country of origin and of legal and procedural guarantees; the introduction of standard forms which can be used for imports and exports, instead of the existing variety of procedures; better rates for air freight and postal consignments, the minimum weight being reduced to 25 kg; favourable treatment for the introduction and circulation of works published in the area under co-publishing or "co-production" schemes; favourable treatment for returns, book catalogues, atlases and published works incorporating slides, films and recordings on disc or tape or similar accessories; and a reasonable definition for use in interpreting terms such as "deluxe bindings", fly sheets, display folders, limited numbers of posters and other printed matter intended exclusively for the promotion of books and magazines.

3. The preparation of standard bases for the legislative treatment of copyright, the transit of persons and a common régime for the establishment of enterprises and the introduction of capital, favourable treatment being accorded to enterprises and capital from countries of the area.

The recommendations summarized above received little support from the governments of the contracting parties. Only one state requested that they should be dealt with in the framework of LAFTA.

The draft "standard form" for exports and imports was one of the basic instruments for reducing the vast number of different procedures. This was the most promising proposal from the technical point of view, and aroused hopes which were subsequently dashed at a meeting of customs experts. This meeting addressed itself purely to the fiscal aspects of the question, and favoured the adoption of restrictive criteria, without conceding the merits of the regional development envisaged for the book trade.

As it was not possible to pursue the matter further through LAFTA channels, CERLAL prepared a preliminary draft agreement, on the basis of the studies carried out in the context of the above-mentioned sectoral meetings. This draft served as a working document for further discussion of the subject in April 1977. This discussion took place at a meeting in Buenos Aires; it was convened by CERLAL, and was attended by representatives of the firms in the private sector, which were associated through the different Book Chambers of Latin America (Argentina, Bolivia, Brazil, Chile, Colombia, Paraguay, Peru, Uruguay and Venezuela) and of Spain.

At this meeting, various amendments were introduced, but no alteration was made to the broad lines of the draft document, and the participants subsequently signed the "Buenos Aires Declaration", in which they accepted the draft agreement on the free circulation of books, part-works and magazines and also expressed their determination to take the necessary steps to ensure that the text and its underlying principles were accepted by the competent bodies of the different states, before an intergovernmental meeting of the plenipotentiaries of the countries of the region was convened with a view to the signing of the above-mentioned agreement.

Under the terms of the Preliminary Draft Agreement on the Free Circulation of Books and Printed Matter between the Ibero-American countries, the signatory countries would undertake to permit the unrestricted movement, commercial exchange, introduction and transportation of the media of expression referred to in chapter 49 of the Tariff Nomenclature of the Customs Co-operation Council, along lines similar to those proposed at the LAFTA meetings. The proposed measures would make it possible, after the completion of all the necessary formalities, to draw up a genuine code of procedures, rights and guarantees on the circulation of the materials in question between the countries of the continent and between them and Spain.

At the Intergovernmental Conference on Cultural Policies in Latin America and the Caribbean, which was convened by Unesco and held in Bogotá in 1978, a special recommendation was unanimously approved by the representatives of the Latin American and Caribbean countries attending the meeting.

Despite such assurances, we fear that it would not be easy to implement all the provisions of the preliminary draft effectively unless changes were made in regard to the items protected under the proposed tariff nomenclature. While there is no question of dropping the idea of blanket recognition, the distinctive features of the goods involved, namely books, part-works and magazines, must not be overlooked. The type and purpose of a publication and the way in which it is produced and marketed give rise to different problems and specific operational requirements. Such circumstances may constitute inseparable obstacles to the development of uniform solutions which are not too complicated to put into effect. The same is true of the various appraisals that will have to be made and that will inevitably result in conclusions which are largely adverse to the provision of equivalent protection.

If the substance of the agreement remains unchanged, the number of accessions will be as small as the number of accessions to the Florence Agreement among the countries of the area, owing to its lack of uniformity.

Such reservations should not discourage those who seek the full and thorough implementation of the principles of free circulation without any hindrance from long-standing bureaucratic practices, which are in some cases quite out of date and survive because of indifference or simply because they have never been abolished.

CHAPTER VII - BOOK PROMOTION

1.1 General considerations

Book production is always aimed at a particular readership. While book marketing and distribution are essential aspects of the process of bringing the book to the reader, they have to be complemented with other activities of a different kind directed towards the same goal.

Generally speaking, these activities are designed to improve the knowledge, dissemination and use of books and to build up all aspects of the book trade. They are developed and carried out in different contexts, which may be public or private, national or international, institutional, professional or individual. They are aimed at all age-groups and all levels of society. These activities include research, stimulation, development and dissemination. This may seem quite a heterogeneous body of activities at first sight, but it has a certain unity of purpose. Ultimately, the task is undertaken in a series of stages, each of which contributes to the attainment of the essential purpose of every book, namely to reach its intended reader.

All this tends to make book publishing a fairly diversified and unsystematic line of business. It would be difficult to give a comprehensive description of book promotion activities in each country of the region, and we shall therefore confine ourselves to a brief general survey.

Although the different organizational structures vary from country to country, one commonly finds much the same institutions and interests in each country. Each nation, as a rule, prides itself on its excellent libraries, which play a varying role in society, with different levels of contact and influence in the communities they serve, whether they form part of an institutionalized library system or not.

Again, one often finds, in different areas, bodies, societies, institutions, scientific and literary associations and cultural centres which, in one way or another, undertake or contribute to book promotion and dissemination, and the main newspapers and magazines in each country often publish book reviews or include a book section. There is a growing number of national and regional literary competitions for both established and new authors of children's literature, and book-design competitions are organized for publishers. Book exhibitions, fairs, congresses, symposiums and other gatherings and meetings of librarians or meetings on library science are also frequently held. Mention should also be made of the work done to develop documentation, information and cataloguing systems. In short, much effort goes into book development and promotion.

Despite all these potentialities, however, the lack of a well-knit, systematic and long-term book policy is most keenly felt in this field. Such a policy should be part of a broader, institutionalized policy for cultural and educational matters in general. The lack of such policies gives rise to weaknesses, waste and the dissipation of resources on isolated activities - in short, to a situation in which books do not fully serve their intended purpose. It thwarts plans, disappoints hopes and, what is worse, delays the establishment of a regional market for books which is suited to regional conditions and open to new ideas.

The following list, though not exhaustive, covers the principal points to be considered in connection with book promotion:

1. Education:
    - 1.1 Reading habits
    - 1.2 Literacy programmes
    - 1.3 Educational techniques
    - 1.4 The training of specialized personnel
    - 1.5 Statistics. Surveys
2. Institutions and services
    - 2.1 Libraries
    - 2.2 Bibliography
    - 2.3 Bibliographical information and literary criticism
    - 2.4 Protection of the bibliographical heritage
3. Technical aspects and further training
    - 3.1 Training bodies
    - 3.2 Printing and publishing
    - 3.3 Courses and seminars
4. Dissemination and promotion
    - 4.1 Exhibitions and fairs
    - 4.2 Awards and competitions
    - 4.3 Publicity. Advertising
    - 4.4 Conferences on book development
    - 4.5 Printed matter

A detailed consideration of these points is unnecessary at this stage. Several of them have already been discussed in other chapters. We shall concentrate on the first point - reading habits - and on book exhibitions and book fairs, which have aroused much interest in recent years.

In today's consumer society, every product has to be advertised if sales are to be increased. Books are no exception to this rule. The narrow profit margins on books rule out the possibility of substantial investment in advertising, which is far below the required level. The need to overcome such limitations and in some way make the public more aware of books without going through the channels traditionally used in the book trade has led people to take joint action of various kinds, often with considerable success.

Book exhibitions and fairs, for example, have become one of the most important forms of book promotion in recent years. Several large cities in the region periodically organize such events, which have become a regular feature of the life of the book trade. The Buenos Aires Book Exhibition, for instance, is one of the most important cultural events in Argentina. It is not confined to the exhibition and sale of books, but includes art shows, lectures, plays, concerts and other performances. All the countries which are officially represented take part, and also specially invited foreign personalities.

These exhibitions are becoming increasingly successful. The most recent one, the Fifth Buenos Aires International Book Exhibition, on the theme of "The Book, from the author to the reader", was attended by more than 700,000 people in just over a fortnight. During this period, approximately three million dollars' worth of books were sold.

The São Paulo Book Biennial is another major event in the region.

Finally, it must be borne in mind that book fairs should not be an end in themselves. They should mark the beginning of a series of constructive activities that will consolidate the progress achieved. The initial impetus and the interest awakened in books should spread the influence of the book fair among the population at large. It should become a temporary focal point for advertising, information services, personal appearances by authors, competitions and any other activities serving to promote books and the book trade.

The Rio de Janeiro Seminar on Book Distribution and Promotion, held in November 1978, considered these questions and expressed the following view:

> "Today, book fairs and book exhibitions are one of the main ways of stimulating and developing the book market. They should continue to embrace both the cultural and the industrial and commercial aspects of book publishing, which should be regarded as complementary, since the development of a fully-fledged publishing industry is a vehicle for mass cultural dissemination".

The establishment of the ISBN (International Standard Book Number) system in the countries of the region will not merely promote books on the home market but will facilitate the development of mechanized procedures, publishing management, book classification, stock control and accounting methods for publishers and distributors. It can likewise be used for bibliographical purposes and for handling bibliographical materials, and will therefore be a valuable tool for libraries, publishers, and booksellers. Lastly, the annual publication of ISBN catalogues will be an important aid for book dissemination.

Graphic design should contribute to book promotion, which should begin with the book itself. Professional advice should be sought before any decision is taken on the graphic aspects of a book, such as the jacket, the format, the typography, and diagrams or illustrations, if there are any.

2.1 Research on reading habits

The question of reading habits is one of the most important aspects of our subject.

There has recently been an increase of interest in the promotion of reading, both in view of its intrinsic merits and in connection with book development. Modern technology has made book production a straightforward process, and the books produced can be evaluated in terms of quantitative output, like any other industrial product. This aspect of book publishing requires nothing more than the application of technology and capital resources. But this only means that half, or less than half, of the problem is solved. The major difficulty consists in creating readers, not in producing books. It is a question of facilitating the flow of books (which are fundamentally a message) from the producer to the reader. In economic terms, we must seek the elasticity curve of the market and capture the potential market so that it can be added to the existing market.

It is obvious that, before adopting corrective measures to deal with the situation, we must find out exactly what that situation is. Surveys should therefore be conducted to provide a basis for an analysis of the situation, with a view to applying specific remedies and setting things right. Such surveys can give the publishing industry information that it will find invaluable when it is planning its output, for they provide the same kind of information as a market study. Furthermore, this information is very useful for the development of consistent policies in the educational, cultural and social fields, because books are closely related to education, cultural needs and economic development.

In this kind of research, as in other fields, Latin America lags behind other regions of the world.

A survey conducted in Brazil provides some useful data, although it was only carried out for a particular purpose. Two thousand two hundred and eighty-seven respondents who answered questionnaires on a list of different audio-visual and cultural activities put reading at the bottom of the list. The most important activity was "listening to music" (1,325 respondents), followed by "going to the cinema" and then by "watching television". "Reading" was placed last (1,008 respondents). Within the possible range of replies (16 items, 14,000 replies given) reading represented 7.8 per cent of the total.

It is interesting to note the data specifically relating to reading which were gathered in the survey. They are taken from the work published in 1976 by the Brazilian Book Chamber (in Rio de Janeiro) and the National Syndicate of Book Publishers (in São Paulo) entitled "Uma política integrada do livro para um país em processo de desenvolvimento" (an integrated book policy for a developing country). The correlation of ages, school or educational level and a preference for reading shows a decline in reading at the higher education level:

Primary level			Secondary level	Higher level
Less than 5 years	5 years	Full 8 years		
%	%	%	%	%
25	43	52	56	51

The research study conducted in 1974 in six major Brazilian cities (Belém, São Luis, Recife, Belo Horizonte, Santos and Curitiba) on the basis of interviews with secondary-school pupils, with the aim of comparing reading habits with the use of other media, is summarized in the following table:

	No. of forms	Regular use of the medium indicated				
		Newspaper	Radio	TV	Cinema	Books
Absolute	823	296	546	573	291	324
Relative	100%	35,9%	66,3%	69,6%	35,3%	39,3%

Many research studies have been carried out on this subject, but most of them refer to European countries or the United States. Very few deal with Latin America.

The general scheme on which such studies are based is primarily geared to market research. This is logical enough in the case of culturally and economically advanced countries (which have practically no illiteracy, a high per capita income, a powerful publishing industry and relatively low unit prices for books). It may be said that the primary aim of such surveys is to answer the question: "What do people read?" - though this is an over-simplification. They are marketing studies designed to determine what the situation is regarding demand and to account for the success or failure of a particular work or type of work. It should not be forgotten that in these countries there is virtually no gap between supply and demand, because it is assumed, with good reason, that the relation between supply (production and imports) and demand (books actually sold) is in step with the per capita income.

This state of affairs is in marked contrast with the general situation in the region which, with few exceptions, registers a shortfall in production that cannot be simply supplied with imports, in view of the lack of governmental and private resources. Another striking difference is the uneven illiteracy rate; because of this the field investigated, and not merely the methodology selected, should be reconsidered.

In Latin America, this type of study should concentrate on reading interests since, as the market is inadequately supplied, the main aim should be to determine present gaps in production. A survey of present, potential or former readers in the urban, suburban and rural areas should be designed to establish not so much what people read as what they would like to read or what they need to read.

Reference is repeatedly made to the shortage of functional books, especially at the lower levels of education, and particularly books for the newly-literate.

Relapsing into illiteracy is all too common an occurrence, and efforts made to prevent it have not led to an improvement. The situation is worse in rural areas, where books are practically unobtainable. This is why it would be useless to confine the survey to what is read at present. There is no point whatsoever in setting up research machinery simply to arrive at a conclusion which is already known, such as the fact that people in rural areas do not read. Other more constructive and more realistic findings must be obtained: we must find out the reasons why people do not read, reasons which do not merely reflect the fact that books are expensive or scarce or that book promotion does not reach the rural areas. There are grounds for thinking that the low reading level is fundamentally due to the fact that book production has not been planned so as to meet the needs reflected in actual reading levels and the target levels for each sector of the community.

On the basis of these assumptions, it may be maintained that the kinds of studies described above should be regarded as points of reference, which have to be adapted to the situation of the Latin American countries. Advantage should be taken of the fact that these studies contain much that is of a universal character.

The background to the current train of developments in the region is outlined below.

In 1961, the Regional Office for Culture in Latin America and the Caribbean conducted a preliminary investigation on reading levels and habits in Colombia, Nicaragua and Venezuela. Because of the lack of information on the region and its importance for the development of national policies in both private and state sectors, the congress held in Bogotá in 1969, under the auspices of Unesco, advocated, among other important measures, that a study should be made on reading in the Latin American region.

In 1973, a seminar was held on the subject, with the participation of sociologists, educationists, specialists in communication, librarians and so on. At this seminar, various recommendations were made on theoretical and methodological questions and on the policies which should be implemented in the region. CERLAL undertook, as one of its fundamental objectives, to carry out a research project on reading habits and trends in Colombia. It has already completed the design stage of this project.

The purpose of the research project was to conduct a study which would provide bases for the formulation of policies relating to the supply of books, the development of reading habits and the promotion of reading among the people of Colombia. It was to be based on information about the reading population of the country, obtained through a national survey conducted in representative urban and rural centres.

It is also proposed that the broad lines of the research project should serve as a pilot project and as a model for other Latin American and Caribbean countries, providing guidance as to the concepts, methods, instruments and resources needed to implement similar studies in other local contexts.

The following points are dealt with:

(a) the distinction between reading habits and reading interests, as affected not only by the home and school but also by the socio-economic context;

(b) the question whether the child is actually "taught to read" at school - that is to say, whether he acquires the reading habit at school;

(c) the influence of the home and the family environment;

(d) what sort of books people would like to read if they were available, and their actual chance of acquiring books.

The research plan takes into account surveys conducted in other countries which have, however, been adapted to the specific circumstances of the Colombian reader.

The research study also seeks to explore:

(1) the relation between the book, as one of the mass media, and magazines and newspapers;

(2) the relation between books and the educational system, particularly primary education;

(3) the way in which the individual's position in the production system determines his reading habits;

(4) stratification in relation to reading, particularly as regards income level and competition from other leisure pursuits available to the reader;

(5) in the cultural field, the influence which can be exerted by the example of the family environment and by the presence of books in the home;

(6) the final stage of the project will include the collection of data on the most popular titles, authors and types of books.

As the reader is the key figure in the survey, the analysis of his behaviour will be aimed at drawing conclusions on the relation between supply and demand and the measures which will have to be put into effect in a governmental policy that meets the needs that have been revealed.

The Colombian survey, as has been noted, is the first step in a regional effort to provide governments with basic information on reading habits, interests and levels, present and future needs, and the state of the problem of working out a comprehensive book policy.

These matters are of such permanent importance and arouse such interest that the subject was discussed from a variety of angles at the Rio de Janeiro Seminar on Book Distribution and Promotion (November 1978), where the following conclusions were reached:

II.1 Research on reading habits and levels is a prerequisite for the efficient planning of book production, particularly the production of children's books, which should receive the greatest attention with a view to the firm implantation of reading habits.

II.1(a) Reading assistance should be started in the preschool period, when the child needs the greatest attention, care and stimulation, with a view to promoting his all-round physical and mental development.

II.1(b) It is also important to organize campaigns aimed at encouraging family reading groups, so that they, as well as schools, will foster better reading habits and a love of books.

3.1 Co-ordination. Public bodies and trade organizations

We have already noted that a comprehensive book policy can hardly be put into effect unless it takes into account all the points that are to be inferred from careful examination and effective action. However, we have also seen that, as the activity involved is so extensive and complex, it has to be carried out systematically.

This is normally achieved through the agency of bodies that are essentially concerned with co-ordination and through specific legislation aimed at harmonizing the various interests involved.

The first of these points calls for institutional procedures. The second presupposes a normative ordering of the different factors involved, particularly those of an economic nature. The distinction between these two aspects is by no means absolute, nor are they incompatible. On the contrary, one is generally underpinned by the other; they are implemented in conjunction and function on a reciprocal basis. This section deals with the first of these aspects.

The book trade encompasses such a wide spectrum that it is difficult to avoid unfair omissions or pointless confrontations between the book trade and those who take decisions affecting it. However, the difficulties do not always reflect sectoral conflicts or the lack of available solutions. They are frequently due to the absence of a body with sufficient powers and resources to deal effectively with this broad network of interrelated and convergent phenomena.

In the course of this study, attention has been drawn to the existence of public and private sectors. The first sector consists of the branches of government that in one way or another have an influence on the book trade, in which they have decision-making powers. The private or professional sphere is composed of authors, publishers, graphic artists and booksellers. When all these operate harmoniously, they constitute one of the most useful tools for achieving the coherent development of the book trade.

It is difficult to achieve such harmony unless there is a co-ordinating body which sees to the aspirations and legitimate interests of each sector and at the same time has a well-defined book policy.

The schemes in operation in the countries of the region do not fully meet these needs. For example, the specific objectives of the National Book Institute in Brazil are those of a cultural agency. It engages mainly in cultural promotion activities by producing publications that are considered essential to Brazilian culture and are intended to be sold in low-price editions, in order to meet some of the needs of libraries and encourage the creation of literary works. The National Book Institute of Uruguay fulfils a similar role, concentrating on publishing and distribution and on library services.

In Mexico, a consultative body was set up which is known as the Committee for the Development of the Publishing Industry and the Book Trade (CODIECLI). This body is composed of representatives of the public and private sectors, whose participation reflects the different interests and problems affecting books. Its activities have contributed to better planning and organization in the book trade. In establishing this body the aim was to define the powers of each party and integrate them into the body as a whole. It is believed that if this body takes on other functions, in addition to its advisory role, it could become a focal point for the implementation of a general policy designed to solve the various problems of the book trade in Mexico.

Within the sectoral framework of private enterprise, the Book Chambers have traditionally played a significant role in Latin America.

In the Argentine Republic, there are at present three Book Chambers, the oldest and most representative of these being the Argentine Book Chamber. The Argentine Chamber of Book Publishers is the successor of the Argentine Chamber of Technical Publishers; the most recent body, the Argentine Chamber of Publications, largely represents the interests of importers.

Brazil also has two important bodies - the Brazilian Book Chamber and the National Syndicate of Book Publishers, based in São Paulo and Rio de Janeiro respectively.

Mexico has the Chamber of the Publishing Industry, whose membership is composed of both book and newspaper publishers.

In all the other countries of the region, publishers are represented by bodies which are as well-established and highly respected as those described above.

3.2 Regional action

At regional level, it has long been hoped to establish a federation on the basis of the existing national organizations.

The first congresses of publishers in Latin America, held in Santiago de Chile (1946) and Buenos Aires (1947) were an example of such joint action.

The First Congress of Ibero-American Book Associations and Book Chambers, held in Mexico in 1964, was perhaps the most significant gathering, in view of the subjects it considered and the very fact that it was the first such congress. The resolutions adopted at this congress give an idea of its importance:

I. It resolved to establsh the future policy of the Associations and Chambers of Publishers, taking to its logical conclusion the idea of unity and complementarity in production for the Latin American market and promoting the integration of the publishing industry of the Americas.

II. It resolved to adopt a general policy for the supply of raw materials and other materials needed in the production of publications which would:

  (a) make it possible to produce them at international cost levels without any undue interference through the imposition of duties and other charges introduced with a view to protecting the national industry that produced similar materials;

  (b) be compatible with each nation's level of development and its economic policy.

III. It recommended that, in view of the recognized need for capital investment in the publishing industry, the governments of each state should adopt sound fiscal policies, in particular, tax exemption on all profits reinvested in the publishing industry, progressive depreciation according to the age of stocks, and exemption from taxes on the publishing trade in general.

IV. It recommended tax exemption with respect to royalty payments made by publishers, without prejudice to each country's system of taxes on personal income, on the basis of complete reciprocity; and the application of the system in force in each country to payments remitted abroad for the use of translation rights, until such time as tax exemption is introduced.

V. It expressed the desire that, as far as possible, publishers that belong to the Ibero-American Federation of Book Chambers should use and promote the work of writers, teachers and technicians from the Ibero-American world.

VI. As regards the protection of the language area, it recommended that all the bodies which belong to the Ibero-American Federation of Book Chambers should undertake to ensure that their governments adopt legislation that protects, ensures or promotes the free introduction and circulation of publications, providing that they are published in the language of the country of publication, and, on the other hand, levies a duty on those which are published in Spanish or Portuguese in a country which is not Spanish-speaking or Portuguese-speaking.

This duty is not applied to publications of intergovernmental agencies, language textbooks, multilingual editions, works published under co-publishing arrangements by publishers of the Ibero-American area and of one or more other language areas, so long as such jointly published works are genuine and confrom to the standards which are to be established, as a matter of the utmost urgency, by the Ibero-American Federation of Book Chambers.

4.1 Regional bodies. CERLAL

After the Mexico meeting, other important meetings were held in Latin America. A number of these have already been mentioned in the course of this study (the Montevideo meetings in 1973 and 1974, within the framework of the Latin American Free Trade Association (ALALC) and the Buenos Aires meeting held in 1977.

However, the Meeting of Experts on Book Development in Latin America, held in Bogotá in September 1969, in pursuance of a resolution passed at the fifteenth session of Unesco's General Conference, was to be the most significant milestone in the evolution of regional institutional action in the field of book development in the Spanish-speaking countries.

The resolution and the appended memorandum pointed to the need for a concerted book development programme in Latin America, based on the common language and culture of the region and on its long publishing tradition.

The meeting formed an integral part of a long-term Unesco programme aimed at building up book production and distribution in each region. Approving this programme, the above-mentioned General Conference stated that books are a vitally important means of furthering both social and economic progress and international understanding. In accordance with this programme, various meetings were held in different parts of the world: Tokyo (1966), Accra (1968), Bogotá (1969) and Cairo (1972). They were followed by the establishment of Regional Centres for Book Development: the Tokyo and Karachi centres for Asia; the Yaoundé centre for Africa; the Bogotá centre for Latin America and the Caribbean; and the Cairo centre for the Arab States.

At the Bogotá meeting, it was stated that the centre should be an effective instrument for implementing many of the suggestions made and should serve as a permanent co-ordination centre in the region; it should be a response to a real situation - the fact that the book trade in Latin America was characterized by inadequate production and inefficient distribution, as all the participants agreed. The objectives were of course more ambitious, but they were practically all intended to meet the recognized needs of the region.

The experts also recommended that the centre should be based in Bogotá, since the Colombian publishing industry is at an intermediate stage of development, and geographically speaking the country lies midway between the two major Latin American publishing centres.

Shortly afterwards, in March 1970, the Colombian Government established the first administrative office of the Regional Centre in Bogotá. Its statutes, approved by Decree No. 2290 of 1970, contained all the legal provisions that would be needed if the centre subsequently became an intergovernmental agency in the region.

In April 1971, under an International Co-operation Agreement signed between the Colombian Government and Unesco, the centre became an international agency serving countries of Luso-Hispanic language and culture whose governments had expressed the wish to participate in its activities. The above-mentioned agreement remained in force until 31 December 1976.

Early in 1977, on the occasion of the renewal of the above-mentioned instrument on international co-operation, the agreement was revised so as to include the Caribbean countries, in view of the terms of the recommendations approved by the Intergovernmental Conference on Communication Policies in Latin America and the Caribbean, held in San José, Costa Rica, in mid-1976. The validity of the agreement was extended to 31 December 1982.

In addition to the host state, Argentina, Bolivia, Brazil, Chile, Costa Rica, the Dominican Republic, Ecuador, El Salvador, Panama, Paraguay, Uruguay and Venezuela have become full members of the Centre to date. Spain is an associate member of CERLAL.

CERLAL is composed of: (a) the Board, which is the principal organ of the institution and is made up of representatives of all the Member States, whether full or associate members, and of Unesco; (b) the Executive Committee, composed of the representatives of the host state, Unesco and six countries designated by the Board; it is a technical and advisory body, and its main functions are to manage and direct the general affairs of the centre, to ensure that it is run in accordance with the policy adopted by the Board, and take any necessary decisions in furtherance of the smooth running of the centre; (c) the Director, who is the legal, administrative and executive representative of the centre and is responsible for the management of its funds and the implementation of the regional programmes and policies established by the Board and the Committee.

In order to enable the reader to understand the objectives we reproduce below Article 4 of the Statutes:

> "The Centre shall be responsible for the development of book production and distribution and in particular the promotion of reading, especially through education plans; it shall also provide the essential back-up services for public and school library systems in each country. With a view to the attainment of these objectives, the Centre shall:

1. Promote the co-ordination of the efforts of public and private bodies in the region and formulate guidelines for the production, dissemination and distribution of books in the countries of Latin America and the Caribbean.

2. Promote the application of measures needed to ensure the development and harmonization of the book market in this area, in such a way that a common market can eventually be established.

3. Encourage the establishment of national bodies devoted to book promotion, with the aid of local, public and private institutions which wish to co-operate in this activity.

4. Compile and make available to the above-mentioned countries statistics and documentation relating to book production and distribution and the demand for books in the region, taking account of the cultural features these countries have in common.

5. Begin work on the periodic and regular compilation of the bibliography of works in Spanish and Portuguese.

6. Conduct systematic research on reading habits, levels and interests.

7. Carry out studies, at different educational and socio-economic levels, designed to determine what is the most appropriate strategy for the promotion of reading.

8. Develop training and career advancement schemes in printing, publishing and book distribution, and conduct research on human resources.

9. Carry out studies on copyright, with special emphasis on the specific problems of each country which restrict the application of international copyright agreements; protect copyright and ensure its observance, and contribute, with the assistance of the competent international agencies, to the establishment of workable schemes for giving the peoples of the region access to the wellsprings of universal culture.

10. Organize and strengthen school and public library services in each country, co-operate in the implementation of plans for such services at regional level, in accordance with the socio-economic conditions of each state, and promote regional training programmes for librarians, including school librarians, and administrators of school and public library services."

It is not possible in this study to give a complete account of CERLAL's activities to date. It has organized some 20 seminars, courses and meetings in various Latin American countries and in Spain, which were attended by around a thousand fellowship-holders from all over the region. It has also organized numerous studies and research projects, issued publications and reports, held lectures and so on, particularly in connection with book production, distribution, circulation and development, of books, as well as copyright, the encouragement of reading and library science.

CERLAL can make a valuable and effective contribution to the development of the book trade in the region. But it will not be fully successful unless it has the support of the countries of the region in its efforts to meet the genuine requirements and needs of each of them. To put the matter briefly, the centre must adopt an integrative approach, but its execution must be decentralized, its action being aimed at strengthening the publishing industry in each country, without neglecting any of the principles which are characteristic of the book community in Latin America.

5.1 Book policies

The various points dealt with in the course of this study will give the reader a good idea of the salient features and patterns of the Latin American book market. However, our study of this subject would not be really complete without some account of the book policies that reflect the needs and goals of the countries of the region. On this point, very little, if any, progress has been made.

We often hear of the need for the countries of the region to implement policies for the different sectors of the national economy. We hear of a country's economic policy, monetary policy, energy policy, iron and steel policy and even education policy, but seldom, if ever, of its book policy. It would seem that economists, who see the publishing industry simply in terms of products and prices, disregard the second, far-reaching and indeed immeasurable aspect of this industry; they forget that a book is a creation of the human intellect and is a unique means of cultural dissemination and human advancement. They have consequently not given enough thought to the necessary measures to develop the publishing industry.

Action to implement book policies is exceptional in the national context and rare at regional level. The reason for this lies not so much in failure to formulate policies as in the difficulty of carrying out the necessary measures and research studies, obtaining information, organizing the requisite administrative services and mobilizing the human and financial resources needed for their implementation.

There is a growing awareness of the need to overcome such difficulties, which are a matter of serious concern in practically all the countries of the region.

Perhaps one of the most effective means of ensuring the adoption and implementation of a national book policy would be to set up national bodies on which all the sectors connected with the book trade, whether governmental or professional, would be represented. Such bodies could be called National Book Councils or something similar. They could be empowered to develop forms of action to meet local needs, and could be designed in such a way that they could become co-ordinating and research bodies, without obstructing or duplicating the work of bodies and institutions with clearly defined responsibilities in these fields. Furthermore, they would be in a position to receive support from international and regional agencies.

Unesco has recently endeavoured not merely to develop book production and distribution but to encourage an attitude of mind which is favourable to the implementation of book promotion policies, particularly in developing countries. As has been noted above, this is one of the ideas behind the establishment of regional centres for book development in different parts of the world.

It was extremely encouraging that the recommendations adopted by the Conference on Cultural Policies in Latin America and the Caribbean, organized by Unesco in Bogotá (January 1978), included six which referred to books. These recommendations are: No. 22, on Literature for Children and Young People; No. 26, on Public and School Libraries; No. 47, on the Common Market for Books; No. 48, on the Free Circulation of Books; No. 49, on Regional Book Development; and No. 50, on Intellectual Creation. We attach particular significance to recommendation No. 49, which reads as follows:

Considering:

that books represent one of the most effective and durable means of creating and propagating culture; that book promotion policies help to make our cultural heritage better known and facilitate access to it by all peoples and by all levels of the population;

that Unesco and the Colombian Government, aware of the foregoing, agreed to create the Regional Centre for Book Development in Latin America and the Caribbean;

that most countries in the region have already joined the Centre;

that, bearing in mind the Centre's experience and the nature of the book market in Latin America and the Caribbean, energetic action must be taken to develop further the production and distribution of books;

that Unesco should strengthen existing structures within the framework of regional co-operation,

1. Recommends to Member States of Latin America and the Caribbean which have not yet joined the Regional Centre for Book Development:

   that they should take the necessary steps to do so and to participate in its activities;

2. Recommends to Unesco:

   (a) that, through the Centre, it should assist in formulating a co-ordinated publishing policy in the area that would not only foster the free flow of cultural currents in the region but would also strengthen local creativity through the encouragement of authors and the introduction of technological innovations in the field of publishing;

   (b) that it help the Centre in carrying out an active campaign to make known the new facilities granted to developing countries by the Universal Copyright Convention and Protocols 1 and 2 as revised at Paris in 1971;

3. Recommends to the Regional Centre for Book Development in Latin America and the Caribbean:

   that it continue to expand its activities with a view to better satisfying regional needs by dynamically assuming the responsibilities it has been assigned;

4. Recommends to the Director-General:

   that he take all necessary steps to see that the draft programmes and budgets for the next two biennia include all possible financial and technical support for Unesco for the development of the Centre's programmes and infrastructure.

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Books are also considered under broader headings, such as that of the mass media, and play a part in other policies - communication policies, for instance.

The growth of the mass media, which seem to be less demanding than books in that they appeal to a passive audience, has led to widespread pessimism about the role of books and the prospects for the book trade. However, according to Unesco statistics, book production has doubled in the last 20 years, rising from 269,000 to 591,000 titles, while the number of copies produced has trebled. Reading is a complex act, requiring conceptual and linguistic knowledge. It is absolutely vital for a person's cultural development. Books play an essential role in the dissemination of knowledge, ideas and information, that is to say in the satisfaction of the "hunger for reading material", and they always will do so.

The role played by books in this context should of course be integrated with that of the other media.

The subject of economic and social development cannot really be discussed without examining the part played by books in social communication. This was recognized by the Economic and Social Council of the United Nations when it stated that books are an indispensable tool for education, which is recognized as an essential factor in development.

This was why Unesco supported the idea that developing countries should have the right to reprint, translate or adapt, for purposes of higher education, books written and produced in developed countries.

Books play an even more important role in a region such as Latin America which has not yet been able to overcome the scourge of illiteracy, although the illiteracy rate is relatively low in some countries. The different media - particularly radio and television - have co-operated closely in literacy work. They have conducted excellent literacy campaigns and other campaigns aimed at developing primary school and even secondary school programmes. Far from becoming redundant, books will in some degree regain their distinctive role, since written communication essentially enables the reader to sift and arrange information (repeating it, revising it, comparing it); the ideas conveyed are expressed in different ways, and the reader is provided with the kind of basis that is essential to the acquisition of knowledge. Hence we need a policy covering all the media; for the audio-visual media produce a permanent flow of information and awaken curiosity, and the effect of this will be to increase and deepen the intellectual needs of audiences and encourage them to progress in the pursuit of knowledge, in what has been called a "learning society".

Books are so closely bound up with education, the dissemination of knowledge, the transfer of technology and the establishment of library systems that the state cannot shirk its duty to adopt a book policy; at the same time, it is essential that such a policy should be integrated into a broader policy which reflects its responsibility in regard to all the media.

In some countries, as will be seen in the next section, these considerations have prompted the introduction of "book laws", the purpose of which is to facilitate the systematic implementation of book policies. The main value of such laws perhaps lies in the fact that they are intended to meet the educational and cultural requirements of the community concerned, but they also serve other purposes.

6.1 Book legislation

Only two Latin American countries have laws dealing specifically with books. Although each of these laws refers to a different set of circumstances, some of the assumptions underlying them are the same.

As has already been noted, the life of a book, from the time when it is written until it reaches the reader, passes through various stages, each of which should be dealt with separately. The heterogeneity of these stages produces imbalances and, in some cases, undesirable effects, the cultural, economic and social implications of which are all too clear. A glance at the situation will show that book laws are generally unco-ordinated and sometimes contradictory, if not wholly inconsistent. The diversity of legal and administrative authorities adds to their complexity and hinders the consistent and comprehensive treatment of the question.

In these circumstances the state has had to play an increasingly important role as the administrator and regulator of the affairs of the community. In doing so, it has evolved various forms of action which are sometimes inconsistent and generally erratic, not being based on any organically structured idea that is the outcome of clearly-defined policies.

Proposals for solving the problems of the book trade have invariably accentuated the various sectoral inadequacies and maintained the apparent distinction between the book as an industrial product and the book as a cultural instrument. It has seldom been recognized that these two provinces are interrelated in many ways and are both related to other spheres of human activity.

"Book laws" are an attempt to find a solution to the problems produced by such a distinction.

Almost all these laws are based on a structure designed to embrace most of the aspects of this subject which can be conceived and systematized in normative terms and thereby serve implicitly or explicitly for the development of book policies.

For chronological reasons, we shall begin by considering the Argentine law, which was the first book law to be approved in the Spanish language area. The Colombian book law was approved shortly after the Argentine book law. The legal provisions in force in Brazil and Mexico concerning books and other matters will also be discussed in this section, although they are not specifically "book laws".

The subject is so vast that we shall merely make a few remarks about the most salient aspects of each body of legislation. A comparative survey of these laws will be found in Table 29.

1. Argentina. Law No. 20.380, the Argentine book law, was passed on 15 May 1973.

Although it has been said to be a protectionist law, it belongs, generally speaking, to the category of laws known as "promotional laws", which are quite different. To put it briefly, protectionist laws are characterized by their prohibitive or restrictive tone. By contrast, the Argentine book law is essentially designed to make concessions without introducing restrictions and to offer encouragement without imposing prohibitions. Such distinctions should be clarified so as to avoid confusion in other contexts - the system of free circulation, for instance.

This law originated in the efforts made by the Drafting Committee for the Preliminary Draft of the Book Law, set up on the initiative of the Under-Secretariat for Culture of the Ministry of Culture and Education in August 1971. First of all, representatives of the public sectors connected with the book trade were invited to take part in the preparatory work. They included persons concerned with economic affairs, finance, trade, industry, communications, transport, the postal services, foreign affairs, and of course representatives of the Under-Secretariat for Culture. The provisions drafted by this group were forwarded, for purposes of information and discussion, to the private sectors most closely connected with the book trade, with the request that they should make any suggestions they felt necessary. Many versions were discarded as unsatisfactory before the final version was arrived at. Although difficulties were encountered and the text was somewhat mutilated during its passage through the compulsory administrative channels, the long-awaited law was approved in May 1973.

The general intention of this law may be summed up as follows:

1. It proposes guidelines, forms of action and basic components for a national book policy which is to be put into effect with the participation of all the areas and sectors of the book trade.

2. It regulates the legal and administrative relations affecting the different aspects of the book trade, the book being regarded both as a medium of cultural expression and as an industrial and commercial produc[illegible]

3. It introduces measures designed to foster and support the development of publishing in the broadest meaning of the term, so that books can play the important part that they should in the implementation of a comprehensive educational and cultural policy, and the book trade can cope with the problems which have arisen, particularly in the foreign market.

4. It determines which body is to be responsible for the implementation of the law; this body should also serve as a clearing-house for problems connected with books and should co-ordinate the measures needed to achieve the objectives of the national book policy with the other areas of public administration. Through its representatives, the private sector should support and advise the above-mentioned permanent body, to which it should also make known any matters of concern.

The different sections of Law 20.380 cover the following points: national authors, through the provisions of the article setting out the broad lines of a national book policy, which deals with the development and encouragement of the publication of the works of national authors, the protection of the moral and financial rights of the writer and the introduction of suitable tax concessions for authors and others involved in publishing. In accordance with these aims, it provides for the establishment of a national register of publishing contracts and makes the identification of editions of books printed in the Argentine Republic obligatory, with a view to establishing their authenticity and the number of copies agreed in the publishing contract. It also establishes a credit system for book production and allows 20 per cent more credit for a work by an Argentine author than for a work by an author of another nationality.

Various legal provisions deal with the different aspects of publishing, with a view to increasing book production, meeting the cultural and educational requirements of the country in terms of quantity, quality and variety, regaining foreign markets and achieving a swift and effective reduction in book prices. The law also provides for measures to support the marketing of Argentine books which are published and printed in the country, in order to step up and improve their distribution and enable them to compete in all markets on favourable terms. It advocates a suitable form of fiscal treatment, the promotion of creative work and support for training bodies providing initial and in-service courses in publishing and bookselling, as well as the promotion of well-designed editions. A complete chapter of this law is devoted to credit systems designed to aid the production and marketing of Argentine books in both domestic and foreign markets.

A "Fund for the Promotion of Argentine Books" has been established, for which contributions have been received from a variety of sources, including publishers and printers, the larger contribution coming from the former. The fund is also financed from taxes levied on certain credits, charges made for services rendered by the implementing authority and an annual contribution from the national budget.

Other provisions concern the material aspect of production. They are designed to support and develop Argentine industries supplying the raw materials and printing materials needed for book production and to encourage the installation of new plant, the introduction of technological improvements in the Argentine printing industry and allied activities. Credits are established for this purpose, and provision is made for total or partial exemptions from taxation for plant and equipment intended for the preparation, printing and binding of books.

The tax system gives Argentine publishing houses and printing firms which have their own studios and workshops a capital allowance to the value of 70 per cent of investments in machinery, equipment and installations directly used in book production. Profits derived from the exploitation of copyrights up to a certain amount, including translators' fees, are also exempt from tax. The exemption from stamp duty covers contracts governing the assignment of copyright, book publishing and translation rights, printing rights and sales of paper and books.

Other important provisions deal with the system of circulation; provision is made for reduced postal reates for Argentine books and a minimum weight tariff for other means of transporting books. Books are to be considered as perishable goods. Special export incentives are provided. Books from the Spanish language area may be imported freely, but, as we have seen, provision is made for duties and other charges to be levied on books in Spanish printed in non-Spanish-speaking countries.

Before concluding this description of the Argentine book law, we shall touch on a few points which, in our view, form the cornerstone of a permanent book policy that is consistent and well balanced. The last article of the law before the operative part states that a cultural agency of the Ministry of Culture and Education will be empowered to act as the implementing authority with regard to the law. This agency, which will be advised by the private sector through an honorary advisory board, will put the national book policy into effect. It will be essentially a co-ordinating rather than an interventionist body, acting in accordance with clearly-defined lines of policy. It should be emphasized that the guidelines for the activities of the implementing authority are based on a clear conception of its role: it is a promotional body, but it is not interventionist, because it is a state agency. The state has an obligation, in the common interest, to see that its institutions function harmoniously and fully, and to identify priority requirements for the satisfaction of the needs of the community. In dealing with the problems of the book trade, the state does not choose between taking action and introducing prohibitions. Experience shows that its choice lies between action that is unco-ordinated, contingent, sometimes inconsistent, makeshift or simply inexpedient and action which puts into effect a book policy that has been drawn up and approved by all sectors and that is based on consensus rather than on the adoption of arbitrary measures.

2. Colombia. The Argentine book law was followed by the Colombian book law, approved in December 1973. Although these two laws were approved for different reasons, a number of provisions in the Colombian book law correspond to those of

the Argentine book law, and even the structures of the two laws are to some extent similar. However, the Colombian book law is wider in scope, for it covers not only books but magazines and pamphlets of a scientific or cultural nature.

The first provision in the Colombian book law refers to the adoption of a book policy directed to the attainment of the various objectives set out below.

Like the Argentine law, it treats books and other printed matter as national publications if they are published and printed in the Republic of Colombia, regardless of whether the authors are Colombian citizens or of another nationality.

The law states that the authority responsible for implementing its provisions is the Ministry of Education, through the Colombian Institute of Culture, an established body of considerable importance in the field of cultural activity.

The Colombian law also contains provisions referring to the circulation of books; it establishes preferential postal rates for books printed in the country, which are to be lower than rates charged for books from abroad.

The provision concerning the transportation of books and other printed matter covered by the law is similar in scope to the preceding one with regard to local and foreign firms.

While exportation is absolutely free from duties and other charges, no special export incentives have been introduced. Importation is not subject to obstacles, duties or charges unless the books are imported from countries which do not offer reciprocal conditions for the entry or free circulation of Colombian books.

There are several articles defining the term "publishing house" and establishing tax incentives in the form of exemptions for publishing houses from income tax and capital tax.

The law also exempts from taxation sales of books, magazines and pamphlets of a scientific or cultural nature, including periodicals (which were not previously mentioned) regardless of their origin.

Three points of interest among the other provisions should be mentioned: (a) partial exemption from the payment of income tax and complementary taxes for Colombian authors, as well as a reduction of these taxes in the case of payments made by Colombian publishers to foreign authors or publishers resident abroad of royalties in respect of books published in Colombia; (b) the provision which stipulates that the Ministry of Education shall allocate 1 per cent of its annual budget for the supply of textbooks free of charge to pupils in state schools; and (c) the obligation of the Colombian Institute of Culture to purchase not less than 200 copies of the first edition of each book by a Colombian author printed in the country, for distribution to public libraries and other institutions.

Lastly, provision is made for the organization of a National Bibliography and Documentation Information Service and the establishment of a National Library System; and the National Government is called upon to play an active part in the book devevelopment programmes of international agencies, particularly in the Spanish and Portuguese language area.

Strictly speaking, Brazil and Mexico do not have book laws as such, although Brazil (in 1974) and Mexico (in 1975) adopted laws referring to the subjects treated in the book laws.

3. Brazil. The National Bank for Economic Development has adopted a resolution establishing a Special Programme in Support of the Publishing Industry - PROLIVRO - which is designed to fund publishing programmes and integration projects. Publishing programmes are funded with a view to providing an incentive for book publishing. Priority is given to collections that are representative of Brazilian culture. These programmes are implemented on certain conditions: a fixed proportion of the books must be works by national authors; they must be low-cost books with a large print; and they must be printed in their entirety in the country. The other funding scheme is intended to provide the capital investment needed to enable publishing firms to set up their own distribution and marketing systems and to purchase special typesetting equipment or install a printing plant.

4. Mexico. The Mexican law was introduced in order to deal with special circumstances which essentially resulted from balance-of-payment problems and which prompted the government to encourage and promote the Mexican publishing industry, together with the allied field of the graphic arts, and also to provide funds for their development. Machinery was accordingly set up to further such development.

The first step was the establishment of an advisory body known as the Committee for the Development of the Publishing Industry and the Book Trade (CODIECLI) which is composed of representatives of the governmental sector and the private sectors connected with the book trade. It functions under the aegis of the Department of Trade and Industry.

CODIECLI's main responsibilities include the establishment of a National Copyright Information Centre and co-operation in carrying out studies on paper supplies for Mexican publishers.

Furthermore, the Mexican law establishes various incentives, forms of assistance and facilities for firms in the publishing industry engaged in the publication, printing and binding of books and part-works. It provides for exemptions and reductions with respect to a variety of taxes, including income tax, and the exemption of printing paper for books and of machinery and equipment from import duties, the deduction of advertising expenditure incurred in connection with books and part-works, and other incentives.

5. As we have seen, the "book laws" were introduced to meet needs resulting from specific circumstances, with a view to facilitating the implementation of certain policies, filling gaps in the legislation, bringing together various isolated measures, and generally organizing the complex and manifold aspects of the book trade in a systematic manner.

Table 29 contains information about the laws discussed in this section, for the purpose of comparison. It will give the reader some idea of the scope of these legal provisions. It is too early to expect decisive results from the implementation of this legislation, but it may be said that, from the institutional point of view, considerable progress has been made in this field; apart from other considerations, the passing of specific legislation on books has given books considerable importance at governmental level and among the media.

TABLE 29

SPECIFIC LEGISLATION ON BOOKS AND PUBLISHING ACTIVITIES

General description of the principal measures contained in the respective laws	MEXICO	SPAIN	COLOMBIA	BRAZIL	ARGENTINA	COUNTRIES		
Statement of objectives and policies	●	●	●		●	OBJECTIVES		STATEMENT AND CO-ORDINATION OF POLICIES
Implementing and co-ordinating authority	●	●	●		●	ORGANS		
Tariff reduction		●	●		●	POSTAL SERVICES		CIRCULATION
References to all means of transport. Assimilation to perishable product			●		●	MEANS OF TRANSPORT		
Freedom to export. In some cases, special incentives		●	●		●	EXPORTS		
Exemption from taxes, surcharges and duties		●	●			IMPORTS		
Credit granted in addition to amounts allowed under ordinary credit system. Related to value of production. Preferential treatment for local authors		●		●	●	PRODUCTION		CREDIT
	●	●			●	PRINTING EQUIPMENT		
Additional exemption for local or export sales, in proportion to value. Development taxes		●			●	PUBLISHER	MARKETING	
Operations in local market facilitated. Stock of local books increased		●		●	●	DISTRIBUTOR BOOKSELLERS		
Cancellation or reduction of tax liability; extended to collaborators			●		●	AUTHORS		TAXATION
Exemption for investments. Tax exemptions granted to companies or owners	●	●	●		●	PUBLISHERS		
Similar to previous case. Tax exemption or reduction on machinery imports		●		●	●	PRINTERS		
Incentives and official participation	●	●	●		●	EXHIBITIONS AND FAIRS		PROMOTION
Organization or improvement of services. Exemption. Development	●		●			LIBRARY AND INFORMATION SERVICES		
Purchase of textbooks or books for libraries			●			BOOK PURCHASING		
Establishment of funds, on the basis of different sources of finance, for credit/promotional purposes					●	SPECIAL FUNDS		
Normative regulation of publishing, co-publishing and other contracts		●				PUBLISHING CONTRACTS		
Incentives for local supplies or permissible imports	●	●				SUPPLY OF RAW MATERIALS - PAPER		
Duty-free imports if equal treatment exists	●	●	●			RECIPROCITY		PROTECTION
Customs surcharges on imports of materials printed in Spanish in non-Spanish-speaking countries					●	LANGUAGE AREA		
Punitive measures for infringements of the specific law and the common régime	●	●			●	PENALTIES		
Regulation through other legal provisions for non-operative norms		●			●	COMPLEMENTARY NORMATIVE PROVISIONS		

CHAPTER VIII

CONCLUSIONS

1.1 Final summary. Suggestions for a regional book policy

A. If we want to understand, evaluate or plan a book market in Latin America we must take into account the various factors which determine the overall situation in the region. These are bound up with the distinctive features of the market and its development potential. In regard to economic matters, the region's gross domestic product is growing steadily, if slowly. There are at first sight dissimilarities between the various countries of the region at the different levels of the socio-economic structure, but the overall prospects in the region seem to be encouraging.

Other factors are increased demographic growth, producing a wider band of young people in the age pyramid, an increase in life expectancy and a decrease in the death rate.

Although the illiteracy rates are still alarmingly high, they are gradually falling, both in absolute and relative terms. School enrolments at all levels are rising, and the demand for skilled workers is increasing.

All the countries are making greater efforts in the field of education, which is seen as a lifelong process of spiritual and intellectual enrichment, designed to improve people's material circumstances and also the quality of their lives. Hence, the individual is subject, for a longer period of his life, to the influence of educational activities, both those implemented by the system and other, non-institutionalized activites.

Investment in cultural affairs is increasing, and the policies adopted at all levels are leading to greater support for activities connected with the preservation and use of cultural property.

These are encouraging signs, which augur well for the expansion of the Latin American book market. At least it may be said that the number of readers with better economic and educational prospects is growing, and will continue to do so.

B. Both the production of books and their distribution and circulation are unsatisfactory. One of the reasons why it is difficult to identify the weaknesses and assess their gravity, so that steps may be taken to overcome them, is the lack of statistics and of pertinent and reliable information.

Apart from this, certain policies which are not based on previous assessments but are a response to established needs should be put into effect at once. Such policies reflect the importance of books in modern life. They are evaluated at regional level and are intended to be implemented in a spirit of international co-operation. Other measures, relating to national policies designed to develop a publishing industry in keeping with the needs and capacity of each State, with a view to international integration, should be based on an evaluation of the resources available and the needs for which such policies are intended to cater.

The state is involved in publishing because of the role played by books in connection with education and development plans and their importance as an essential medium of communication. Its involvement extends beyond accession to the international copyright conventions (Geneva, Berne and the regional conventions).

the decision to support international systems for the protection of the circulation of books and the adoption of modern copyright legislation to be implemented at national level. It must promulgate legislation designed to foster and develop the local publishing industry in an international perspective - in this case, that of regional co-operation. The introduction of "book laws" in the region may be seen as an example of the first of these aspects. It should be noted that several nations have adopted such laws, in the form best suited to their own systems and with a view to meeting their particular needs, and that other nations are preparing to do so.

A more detailed examination of these questions shows that:

(a) Despite the population increase, the successful results of the literacy campaigns, the greater numbers of pupils enrolled in educational establishments and the improvement in the economies of the region at certain times during the period, book production falls short of today's requirements. This is true of both the traditional book-producing countries and those countries where book production has not yet reached a significant level.

The existence of the two book laws promulgated since 1973 (although their implementation is still at an early stage) would appear to indicate a growing awareness of the nature of these problems. The publishing industry has failed to expand production in the region - a fact borne out by the high proportion of books imported from outside the region. North American and European firms are setting up subsidiaries or branch offices in the region - another sign that publishers and booksellers in the developed countries believe books will play an important role in Latin American life in the future. In some countries, the state finances the publication of certain educational books, with a view to either providing them free of charge, or supplying educational needs at reasonable prices and, in this way, supporting publishers in the private sector.

With the exception of the cases described above, the state has generally failed to adopt clearly defined book policies in the region.

(b) The region suffers from a serious shortage of the reliable, up-to-date information needed to ascertain the amount of annual production - titles and print size, original works and translations, first editions and reprints or new editions, and so on. Although practically all the countries, in accordance with local legislation, have made it obligatory to deposit works with a view to securing copyright protection, they do not maintain the copyright registers in a manner conducive to the compilation of statistics and in accordance with proper classification standards.

With a few exceptions, there is also a lack of proper definitions by which it can be established, even if only for statistical purposes, that publications which are claimed to be books really are books. Statistics on imports and exports, the production and consumption of printing paper, library purchases, publishing houses, bookshops, the printing industry, and so on also suffer from the lack of definitions and general imprecision. There is no way of finding out how efficient distribution is or assessing the gravity of the illiteracy problem by applying the criterion of "functional literacy", let alone ascertaining how many persons relapse into illiteracy. There are simply not enough studies and surveys showing how competition from the other mass media affects the book trade and the use of leisure time. There is likewise a lack of information on authors and translators (in terms of their numbers and the status of their professional organizations) and on reading trends, skills and habits. Current local bibliographies are either out of date or non-existent.

(c) The most recent statistics, although they are not entirely up to date, show that the media, particularly the audio-visual media (radio and television), reach a very wide audience. A number of studies suggest that the audio-visual media take up more of people's leisure time than reading. The material transmitted by these media must be studied in order to discover whether it encourages the reading habit or not. This question is of great importance for those catering for the future needs of potential readers. In recent years, the readership of newspapers and magazines has not increased at the expense of that of books, but this may be explained by the fact that books published in the region are reviewed in the literary sections or "book pages" of newspapers and magazines.

(d) The countries of the region have copyright laws, some of which are more up to date than others. Their effectiveness in everyday practice calls for observations from the standpoint of both authors and copyright experts.

Some authors, unlike translators, belong to professional organizations. In some cases, the societies which represent their interests are legally authorized to collect royalties or handle other matters relating to the protection of authors' rights.

Local laws are not always in line with the provisions of the international conventions signed and ratified by the various countries, and they differ in regard to the periods of copyright protection after the death of the author.

The "domaine public payant" system has been introduced in various forms, and there is a wide variety of forms of licensing.

Generally speaking, nothing is done to develop the skills and abilities of authors and translators. Most of them receive no social insurance protection, unless they are also in employment.

(e) Only four countries of the region are paper producers, and the paper they produce is newsprint. It is expected that the shortfall in newsprint for regional consumption will be reduced to some extent over the next five years. Even so, it is unlikely that regional producers will be able to supply the paper needed by the book publishing industry, at least in the foreseeable future. It is therefore probable that the paper used in book production (the consumption of which is not distinguished from that of other paper in statistics) will continue to be primarily supplied by the traditional paper-producing areas.

This situation will undoubtedly lead to further friction between publishers and paper manufacturers. Each state will have to take a definite decision, in accordance with the degree of importance it attaches to book publishing, as to how it will integrate into a clearly defined policy the need to supply sufficient quantities and varieties of printing paper, at internationally competitive prices and in consignments suited to the changing requirements of book publishers. This means that the situation must be assessed in such a way that the decisions taken are consonant with overall policies on economic and social development, education, communication and so on.

(f) At present (the mid-seventies) only three book-publishing countries in the region possess printing and bookbinding equipment suitable for book manufacturing, and it is not always of a high standard. Some is out of date, and there are also differences in the variety and capacity of the plant. It would not be too much to say that the countries of the region, with the exception of those mentioned above, do not possess the printing facilities needed to sustain a modern publishing industry. Consequently, research into printing capacity (whether used or not) available for book publishing should be undertaken in order to assess the number of books and other publications for the mass market that can be produced, including traditional book production and the production of part-works and technical and scientific books. Such research, which will provide basic data at present unavailable, should also cover type-setting methods, the preparation of the photolith plate, the different printing processes, the quality of colour printing, traditional bookbinding methods and the "cut-flush" method, and the availability of accessories such as inks, films, adhesive cloth, cardboard, Bristol board and other bookbinding materials.

(g) Information on the scale of the book trade in each country would give us an idea of what is meant by the "circulation of books". Such information, however, is not available in all the countries of the region. In some cases incomplete figures are available, but they are not comparable, because they are compiled on the basis of different criteria (weight, postal packets, internationally acceptable currency, local currency, etc.). But although we cannot say exactly how extensive the book trade is, we can estimate its size and give some account - incomplete and not fully up to date though it may be - of the different factors which affect circulation. There are many local provisions and regulations that affect circulation, and they are constantly changing. In fact, the situation is so uncertain that hardly a year goes by without changes being made in some countries of the region.

(h) Books are sent to different local and international destinations by various means of transport - the postal services, surface freight (land, river or sea) and air freight.

(i) The customs treatment of book consignments varies in the different countries of the region. An unsuccessful attempt has recently been made to introduce a single document covering all consignments, thus standardizing trade formalities in the LAFTA countries. The document was designed in accordance with the national requirements in each country, and could have been used for imports and exports alike, thus simplifying procedures and formalities. It would have done away with the variety of provisions concerning the different numbers of copies of invoices required. Some countries also levy duties which are not applied in other countries, and in one country import or customs clearance formalities and export formalities have to be carried out through a customs agent, regardless of the value of the consignment. There is no up-to-date information on these problems that has been prepared by all the countries, apart from that provided by LAFTA in 1974, which applies only to the LAFTA countries. CERLAL has recently begun to update this information.

Import licences, foreign exchange permits, trading licences, the requirement to obtain consular visas on invoices, "statistical control fees", other duties and charges or restrictions of equivalent effect and equally onerous forms of domestic taxation - all these may be found in one or other of the countries of the region. There is no publication giving information on problems of this kind, which hamper and disrupt the activities of the book trade, sometimes presenting insuperable obstacles.

(j) As a rule, publishing houses, regardless of their legal status, also operate as representatives of publishers in countries outside the region, and sometimes they distribute the books published by a firm in the same country or the same region. Firms often operate as booksellers in general, while publishing their own books. However, some publishing houses engage solely in book publishing.

It is therefore extremely difficult to say exactly what is meant by a "publishing house" as such, and it is equally difficult to say how many publishing houses there are in operation. Very little accurate information is available on this matter, and the data on which this report is based bear out that statement. With the exception of a number of countries which have introduced tax concessions for publishers (Mexico and Colombia and, to some extent, Argentina and Brazil) none of the countries in the region has established a system capable of providing the assistance that the publishing industry requires if it is to meet its immediate needs. The above observations apply not only to taxation but also to the provision of special credit facilities.

In theory, the access of the publishers of the area to copyrighted works is governed by their local legislation or, in the case of some countries, by the system established under the 1971 Protocols. In practice, the situation is different, for with a few exceptions very little information is available, owing to the shortage of bibliographies, the limited number of national copyright information centres, the distance from developed countries and lack of communication with them, and so on. Moreover, there is a shortage of specialized personnel in the publishing industry, even in countries like Brazil which have reached a significant level of book production. Publishers frequently say that better training should be provided for prospective publishing personnel.

The development of publishing houses in countries with a significant level of book production depends on the solution of local economic problems - a high rate of inflation, for instance. This affects publishers' ability to capitalize, and even leads to the closing down of credit-sale operations.

Book production ranges from books for the basic market - which are produced on an alarmingly small scale in a number of countries - to the publication of large-scale works, encylopaedias, dictionaries and part works.

In all, taking into account all the publications produced, more than 30,000 titles are produced in the region. By contrast, the region's consumption of the various kinds of publication amounts to more than 50,000 titles, the difference being made up of Spanish book exports to the Latin American countries.

(k) The term "distribution of books" covers the various stages involved in the conveyance of books from the publisher to the reader.

There are two ways in which books can be conveyed to readers: the latter can either buy and keep a copy of the works in question, or consult them through the library system. The purchaser's aim is always to sell the book, whoever buys it. He may do this through the more or less traditional network of traders (distributors, representatives and booksellers) whose business is buying and selling books, or he may sell them to libraries, either directly or through the above-mentioned traders, or he may use the new systems or channels of distribution.

The process of conveying the book to the reader includes action to let people know that a book with that title has come out, thereby facilitating subsequent sales. This is known as "book promotion". It is either undertaken by the publisher or entrusted to a firm specializing in book promotion. However, the book laws in force make it clear that the participation of the state is essential. Such state support is frequently lacking, even in those countries where it is formally required under the regional agreement.

(l) As both the distributor and the bookseller are essential links in the main distribution chain in the region, particularly for certain types of books, there is a need for studies which provide indicators on this aspect of the book trade. For example, information available in other countries gives an indication of the number of titles which circulate through the distributor-bookshop channel and also the total value of the books sold through this channel. Such information is not available in the region. Nor is it possible to establish a coefficient of efficiency between the distribution cost, the previously mentioned figures and the percentage of the total number of titles produced in one year that are on sale in the bookshops.

Despite the lack of information, it may be said that, to the extent that bookselling has ceased to be a specialized business (primarily because of the lack of trained staff who can advise the reader) bookshops in general are now places where books are sold in response to reader demand rather than as a result of their promotional activity. Nevertheless, a handful of excellent booksellers, who provide a useful service, are still to be found.

(m) The efficiency of the library systems in the various countries of the region varies considerably. In some countries library structures are weak and services inadequate, and there is a shortage of specialized personnel and of the resources needed to train them. Other countries have better structures, but inefficient services, yet they have no difficulty in recruiting personnel. Others again are in an intermediate position. But in none of the countries does the allocation of funds for the network of libraries financed from public funds reflect the importance of the part played by library services in the life of the community and the responsibilities entrusted to them.

Regional statistics on libraries are very scarce, but it is clear that library stocks are far below the "books per inhabitant" figure recommended by the experts. Except in Chile, there is no tax legislation favouring investment in libraries. There are very few "factory libraries".

Library purchases in the region are insignificant compared with library purchases in other regions, where they account for up to 13 per cent of the book production.

Libraries do not seem to have been regarded in the past as links in the information system. Today, they are seen as part of the transfer of technology, within the framework of a more general communication policy. Few countries use modern computerized systems, the ISBN, or similar systems.

As far as can be seen, the essential part played by libraries in the educational system has also been disregarded. The views expressed at the meetings of experts in the region confirm this supposition.

(n) With the exception of a few studies indirectly dealing with reading habits, the project which CERLAL is about to carry out in Colombia will be the first project in the region to explore reading habits and skills by studying the relation between books and the reader according to his occupation, income and education and the level of schooling of his parents. It is hoped that the respondents' answers to the questions asked will throw light on the scale of reading needs and preferences and ways of satisfying them.

On the basis of this initial survey, which will provide an interpretation model for research studies a methodology will be evolved from the Colombian experience which can be used by the other countries in the region to ascertain their needs. In this way it will be possible to determine the state of the problem in each local community.

(o) At the present time, no country can claim to have a monopoly of publishing and of the book trade. No country can publish all the titles of every single author. Each produces more or less the books its readers want to read; this implies that the different countries' participation in the international market is limited. Just as books cross borders by virtue of the universal message which they convey, so too the publishing industry should operate at a level beyond localistic exclusivism.

In the immediate future, cost considerations and the demand for more books and a greater variety of them will increasingly necessitate co-operation among publishers in different countries.

The contractual relations which derive from these circumstances have led to the establishment of new legal procedures and operational systems - for example, co-publishing, in its various forms.

Co-publishing originated some decades ago, as a necessary and useful way of pooling financial resources, reducing risks and, at the same time, taking advantage of the savings made possible by having colour printing done at one printing works and adding the texts in each language, either at the same works or at works in each of the countries concerned. This practice, which is so common in Europe, is comparatively rare in the region. Unesco has reminded its Member States of the bases on which co-publishing contracts are commonly drawn up. In view of the need to make the major advantages of this kind of contract more widely known, CERLAL convened a seminar on this subject in November 1975, inviting various experts from the area to the meeting, which was held in Montevideo. Nevertheless, these admirable efforts to make the advantages of co-publishing better known will come to nothing unless specific measures are adopted to exempt semi-finished works from customs duty and treat them in the same way as works published by national publishing houses.

(p) Two meetings of publishers were organized by CERLAL and convened within the framework of LAFTA in 1973 and 1974. At these meetings, a detailed study was made of trade between the contracting parties and the obstacles which hampered it; a total of 23 recommendations on the whole question were unanimously approved. The recommendations concern three main points: preparations for a common market for books; the elimination of all duties and charges on the transit of books, magazines and publications covered in Chapter 49 of NABALALC; and the development of uniform bases for legislation on copyright, the transit of persons and a common system governing capital originating in countries of the region.

The Buenos Aires meeting was held in April 1977, when the final touches were put to the preliminary draft of an Agreement on Free Circulation, which is to be submitted to the different countries of the region for their consideration, so that it can be approved at a forthcoming intergovernmental meeting.

(q) Furthermore, if it is borne in mind that the book production of the region amounts to more than 30,000 titles a year and that the 20,000 titles produced outside the region must be added to this figure, an analysis of book publishing in Spanish and Portuguese as regards the potential readership, together with comparison with other areas, shows that the failure lies mainly not in production but in distribution. The measures designed to correct this disparity should therefore be concerned primarily with distribution. The common market project advocated by CERLAL, on the basis of the agreement on free circulation, is directed precisely towards making better use of the publishing capacity of the area; it is designed to put into effect recommendations made within the framework of LAFTA and to remove obstacles to trade.

(r) This survey largely deals with the basic aspects of a regional book policy, or at least with the main points that would be covered in such a policy.

The observations we have made on the book trade suggest that any single model for a uniform policy would be premature or ineffectual.

Furthermore, any attempt to promote or support the publishing industry must be preceded by decision-making at national level, from which the different local sectors should not be excluded, for the objectives adopted must be consistent with national policies, of which the State is usually the main architect.

These considerations lead us to propose that overall systems should first be set up, regardless of the situation in individual countries, and that on that basis a specific policy should be worked out in which the situation of each country is taken into account.

In determining which questions should be tackled first, we must take account of every indicator from which we can obtain guidance, information and knowledge of the real situation. But we must strive to achieve two short-term objectives. First, we must determine what stage of development each country has reached, what growth possibilities it has and what is the size of its potential market from the point of view of the publishing industry and the book trade in general. Our second objective, which is complementary to the first, but is based on different assumptions and involves different methods, must be to carry out research on reading habits and interests, at the different reading levels, on the media that influence the book market and on other aspects considered in the discussion of the subject.

As a corollary to these observations it may perhaps be useful to consider a few points which are the fruit of personal experience:

1. The development of comprehensive and sectoral book policies in the region calls for normative instruments that are both specific and organic.

2. No book policy will succeed in attaining national and regional objectives unless it is integrated into a cultural policy that has sound financial backing.

3. Legislation specifically concerned with books will not be effective or be applied in practice unless its implementary machinery can be put into action without depending on subsequent or extra-sectoral regulatory processes.

4. Likewise, such legislation will be effective if it contains provisions ensuring swift institutionalization, particularly provisions for the establishment of higher institutions which have sufficient human and financial resources to co-ordinate the consistent and continued implementation and application of the policies designed.

5. Action to promote books and reading should always take account of the various sectors of the book trade, and an effort should be made to secure their active and continuous participation in such action.

6. Book legislation should not be introduced unilaterally, for books have many different uses and properties. They are at once industrial products and the means by which education and culture are transmitted, and book legislation should take account of both these aspects.

7. Comprehensive book legislation should not merely contain concrete measures, but should state explicitly what objectives are to be attained through such legislation, with a view to providing guidance for future legislative and administrative action on these matters.

8. The book's appeal for the reader should be increased in every way, so that books receive favourable treatment.

9. It must be understood that neither a book law nor a body concerned with books is a panacea, nor can they immediately solve all the problems of the book trade. They should rather be the beginning of a systematic well-planned, sustained effort to do so.

10. Lastly, even if we have the support of bodies, policies and specific laws that are extensive and effective, we must fight the battle on all fronts and at all levels. We shall not succeed unless we persevere and are fully convinced of the intrinsic qualities and potentialities of books.

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